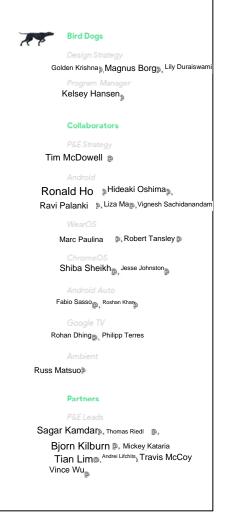
**PROJECT KOKORO** 

## **P&E Better Together** First Draft

go/p+e





**EXHIBIT 5932.R-001** 



NOV 9

1 、

### Listening Sessions

Listen to P&E stakeholders (in 1:1 sessions) or other subject matter experts to understand a multitude of perspectives to start. 2.

# Potential Pillars

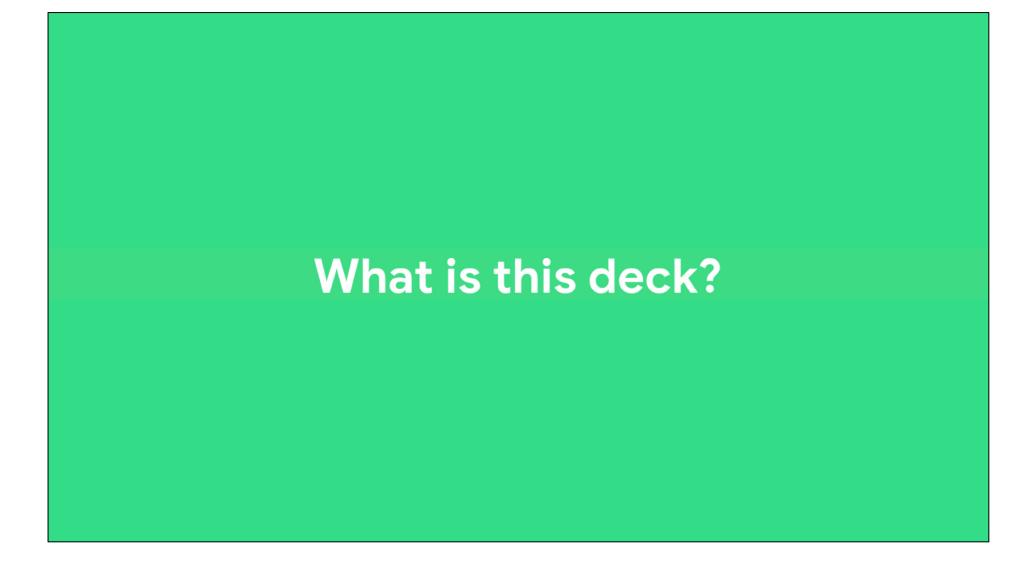
Present a possible high-level story and buckets of opportunity NOV 30

#### FINAL

### Final Presentation

Present final product strategy with a variety of solutions that could be implemented in the short-term.

go/p+e



This is an early take at a high level

Possible story, Product philosophy, And user experience moments.

It's an appetizer of a possible deck.

## It's missing a layer down...

More ideas, Many details, And pixels.

# We're trying to define the right path before we go down the path:

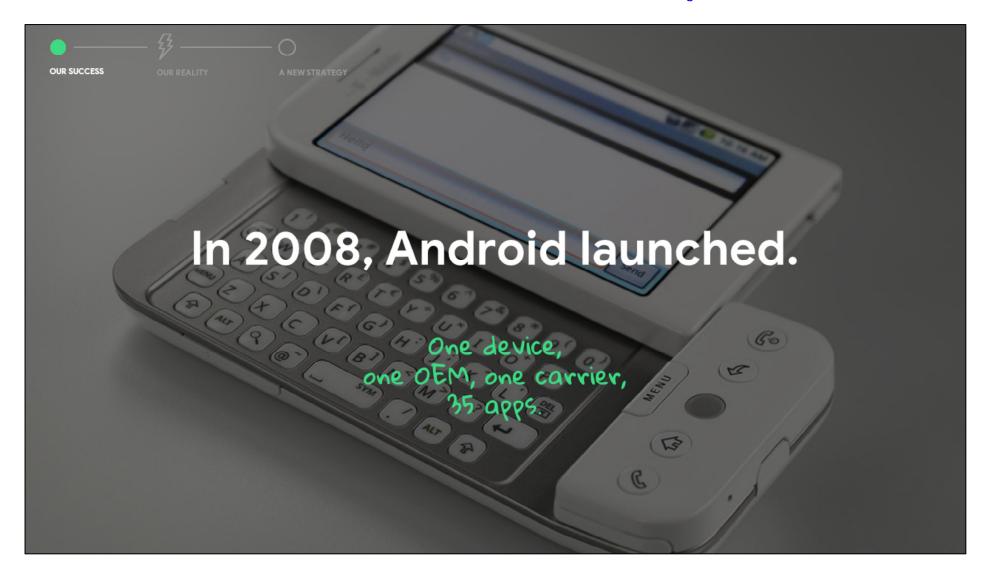
The correct story?
Is this the correct strategy?
The correct basics to build upon?

So next time we can go deeper.

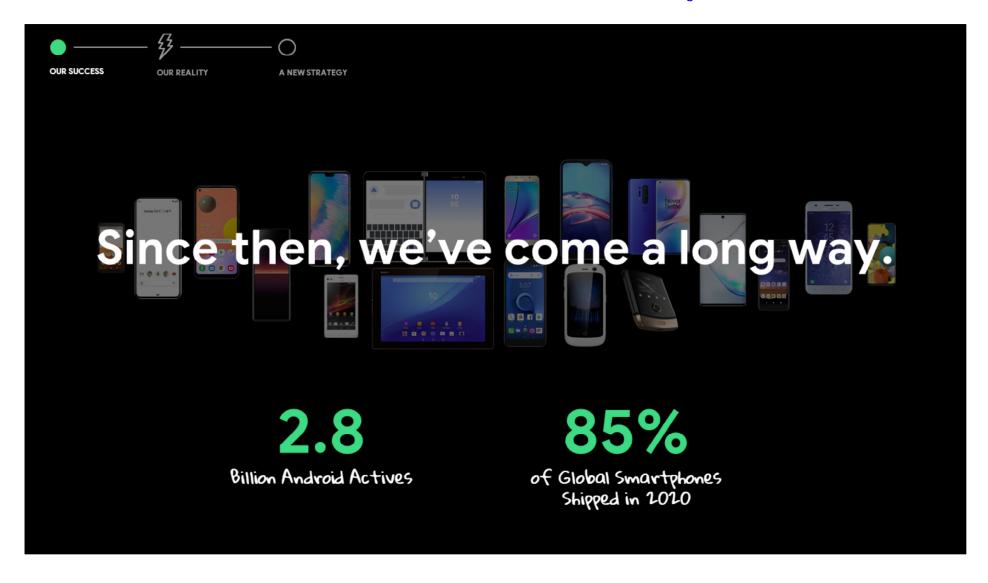
# Introductio

n

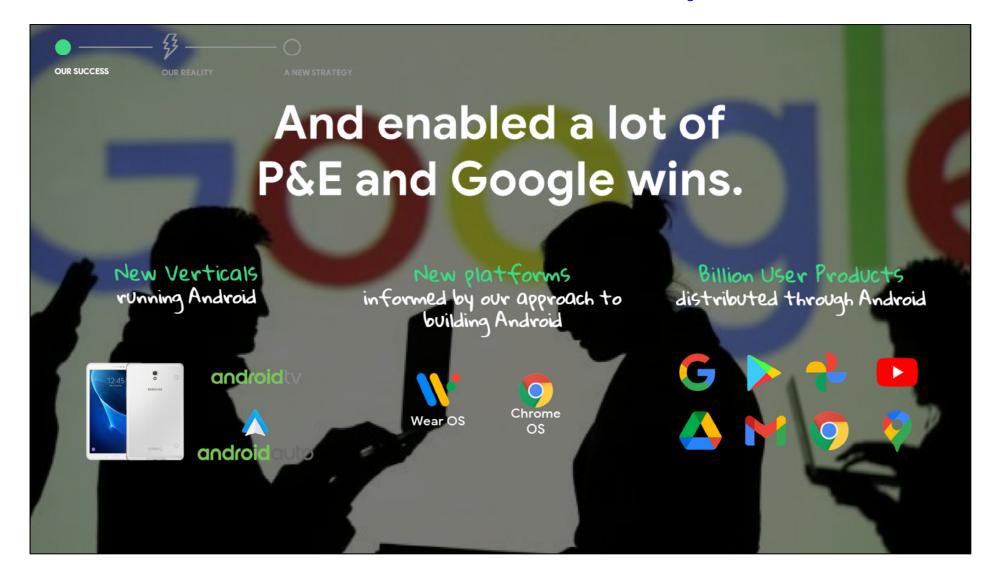
The Vision



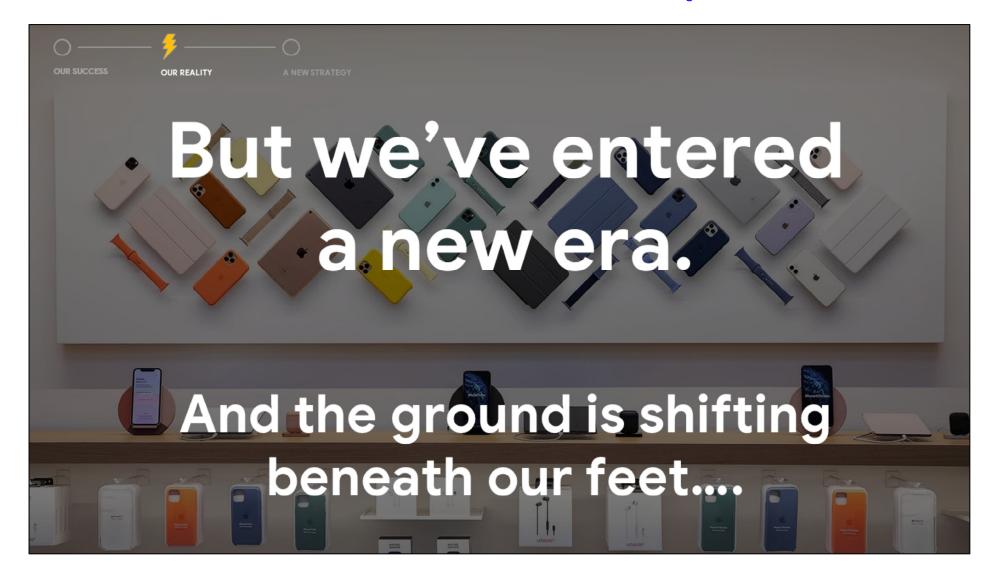
- Voiceover:
- The HTC One launched in 2008, and Android was born!
- It was only available at T-mobile...
- And had 35 apps available through the Android market
- Sources:
- # of apps at launch CNN



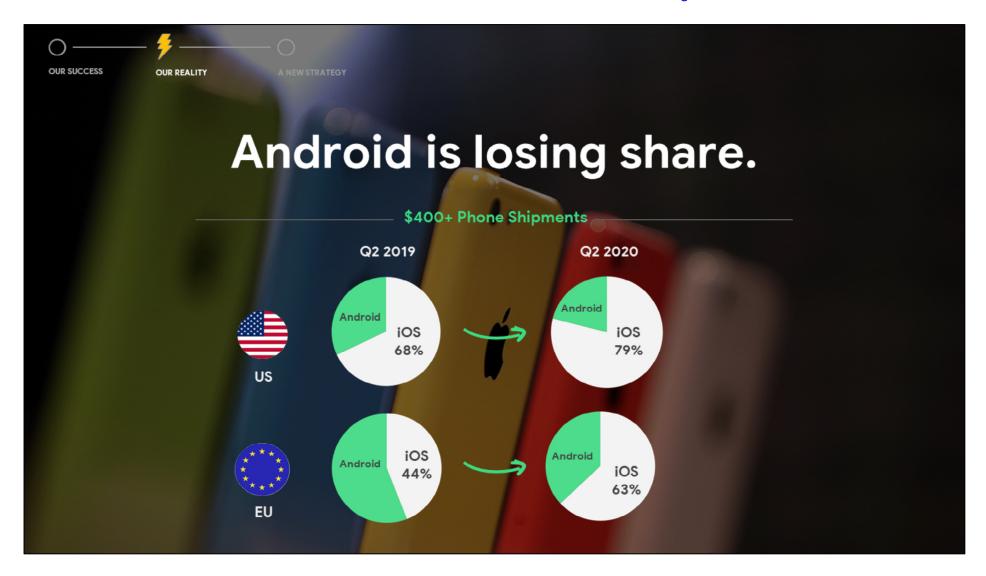
- Voiceover:
- Since then, Android has really grown up!
- Android is now in every country with 2.8B actives and 85% of smartphone units shipped
- Sources:
- Android actives go/play-central
- 2020 Android Share of Units shipped globally IDC



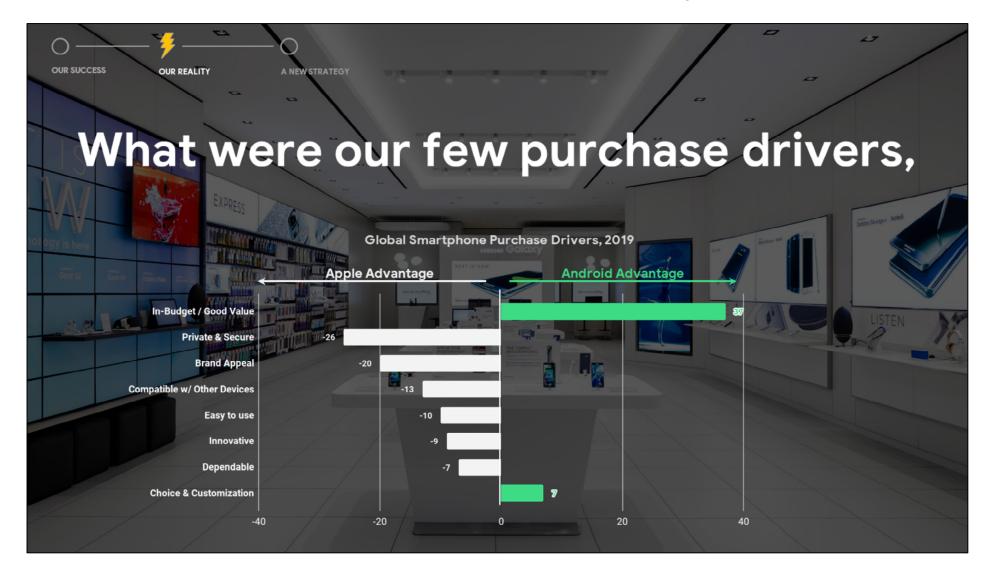
- Voiceover:
- Android helped build the Google we all know today
- We've extended the OS to tablets, TVs, and cars
- We've built new platforms and bootstrapped ecosystems around watches and laptops,
- And we've enabled at least 8 additional Billion+ user products!



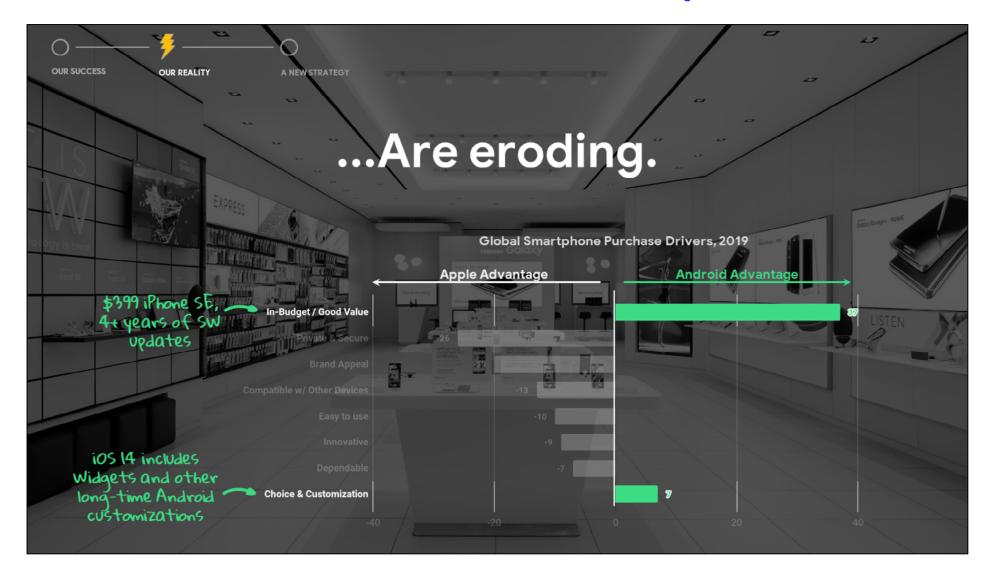
- Voiceover:
- But the times they are a changin



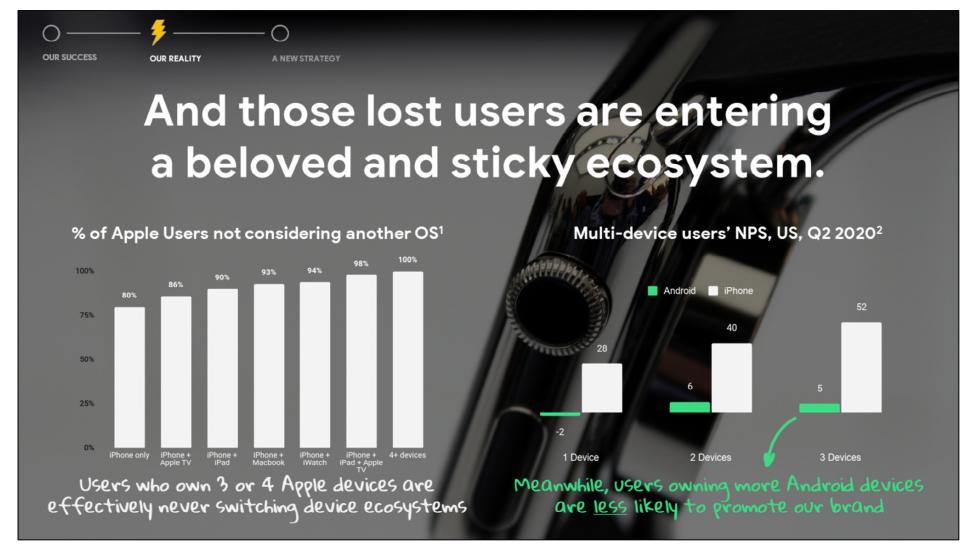
- Voiceover:
- Android is losing share to iPhone, particularly in the mass premium and premium segments with phones >\$400)
- Source: <u>Android Staples</u>, <u>Q2 2020</u> via IDC



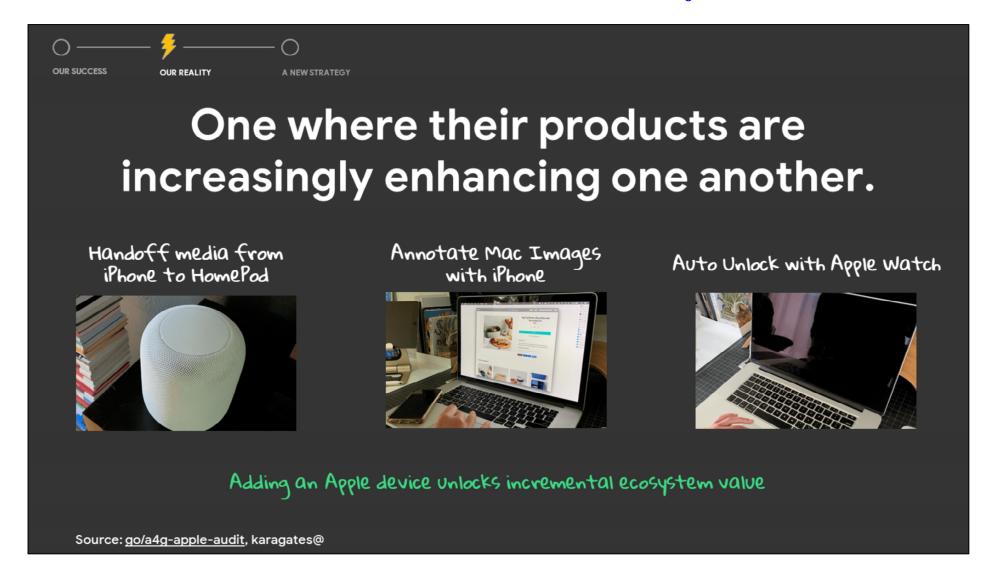
- Voiceover:
- Users historically flocked to Android because of the superior value we provided for the price as well as better choice and customization....
- ....while Apple won on Security, Brand, and x-device compatibility
- Source: Greenheart Brand Relevance Study & Android Brand Tracker 2019, Source deck
- \*Consistent gap magnitude from '17-'19 (Marketing Analytics Android Insights team)



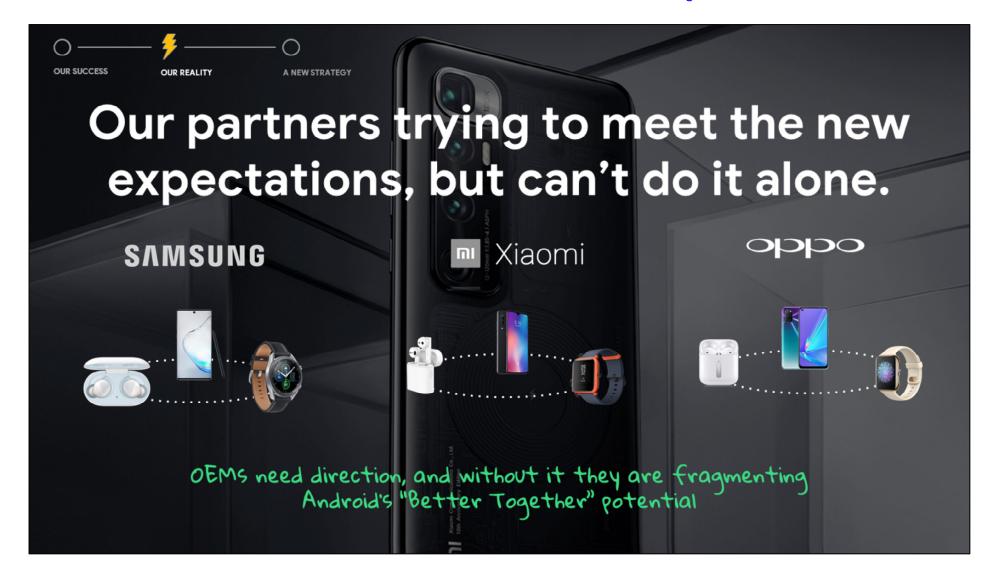
- Voiceover:
- But now Apple is closing in on Android's few remaining strengths....
- With the release of the \$399 iPhone SE and iOS 14+ feature drops focused on greater customization
- Source: Greenheart Brand Relevance Study & Android Brand Tracker 2019, Source deck
- \*Consistent gap magnitude from '17-'19 (Marketing Analytics Android Insights team)



- Voiceover:
- We're losing users to Apple's beloved and sticky ecosystem, and the effects grow the more devices a user buys
- Over 95% of users who own 3 or more Apple device won't consider switching phone OSs
- While users owning multiple Android devices are actually less likely to promote the Android brand!
- Sources:
- Android Staples, 2019Q4 via Asymco, Cantar, Apple Public Reports # of users not considering another OS for their next phone purchase
- Kantar, Q2 2020 more Android devices owned means flat NPS



- Voiceover:
- Apple's ecosystem stickiness comes from their products feeding off of and enhancing one another....



- Voiceover:
- Our partners are doing their best to meet users' increasing expectations for how their ecosystems of devices should work well together
- And we're seeing great innovation from the Samsungs, Xiaomis and Oppos of the world
- However going it alone is producing additional fragmentation within the broader Android ecosystem
- They are begging for direction, since we haven't painted a compelling cross-Google story



# So where do we go next?

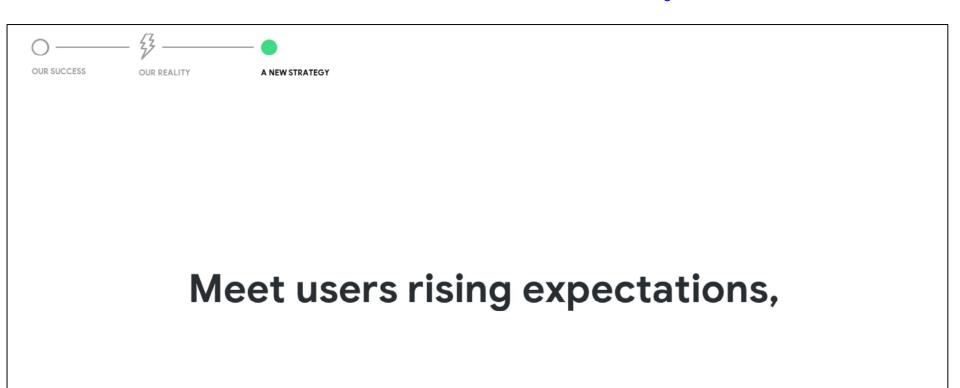
- Voiceover:
- So where do we go next?



# We have much to gain from becoming Better Together.

An ecosystem with benefits beyond those offered by standalone products

- Voiceover:
- We believe "Better Together" has four main benefits to Google



- Voiceover:
- First, we need to meet users rising expectations, as Better Together becomes table stakes



# Meet users rising expectations,

### Slow share loss,

- Voiceover:
- Second, we need to stem the bleeding from Android mobile



Meet users rising expectations,

Slow share loss,

Limit ecosystem fragmentation,

- Voiceover:
- Third, let's limit ecosystem fragmentation as islands of Samsung, etc. devices emerge



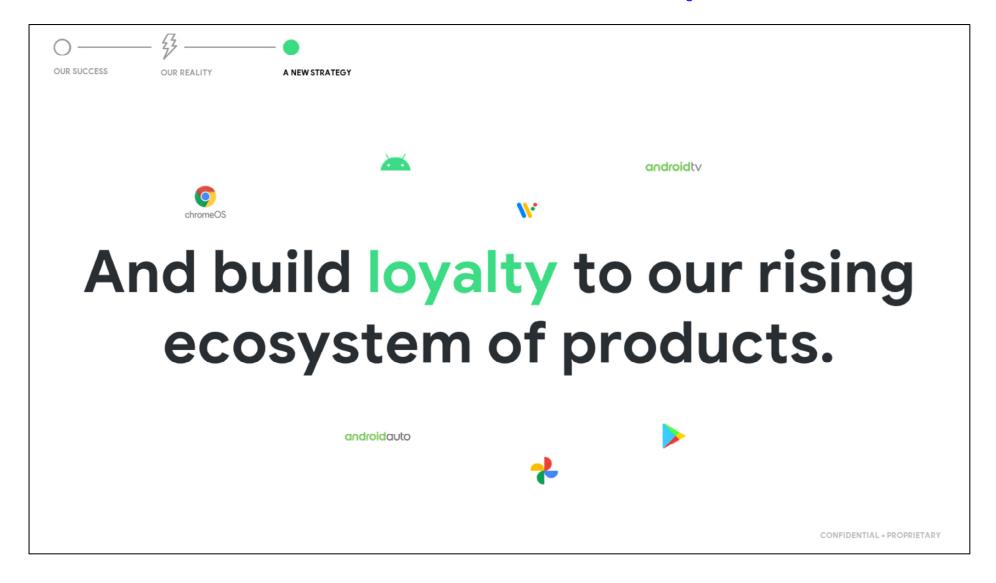
Meet users rising expectations,

Slow share loss,

Limit ecosystem fragmentation,

Give our emerging platforms oxygen,

- Voiceover:
- And finally, we need to be able to rely on Android for the health and growth of our other platforms



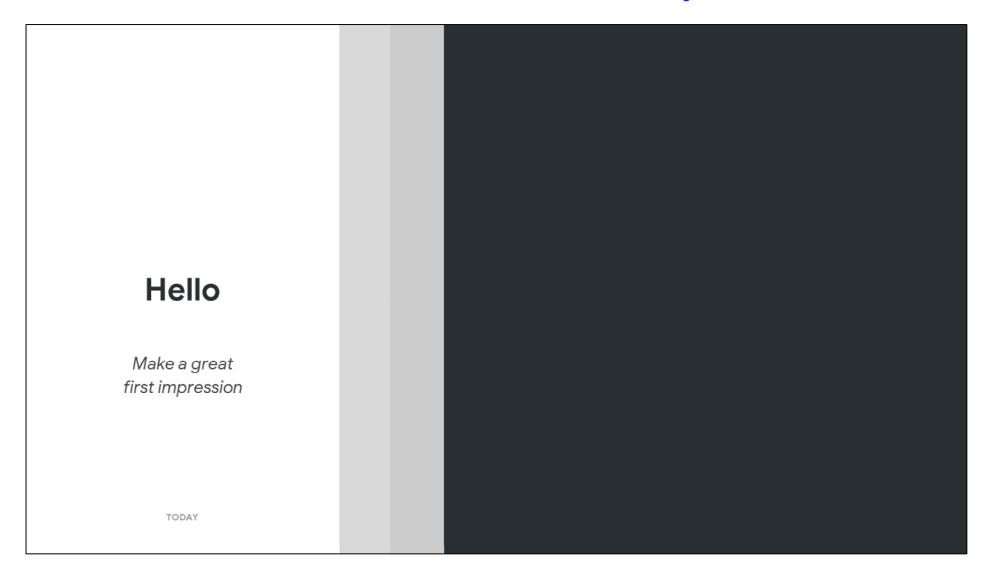
- Voiceover:
- Let's build user loyalty not just for point devices, but for our ecosystem



# How might we turn this around?

What are the building blocks to start now?

- Voiceover:
- So how might we achieve Better Together?



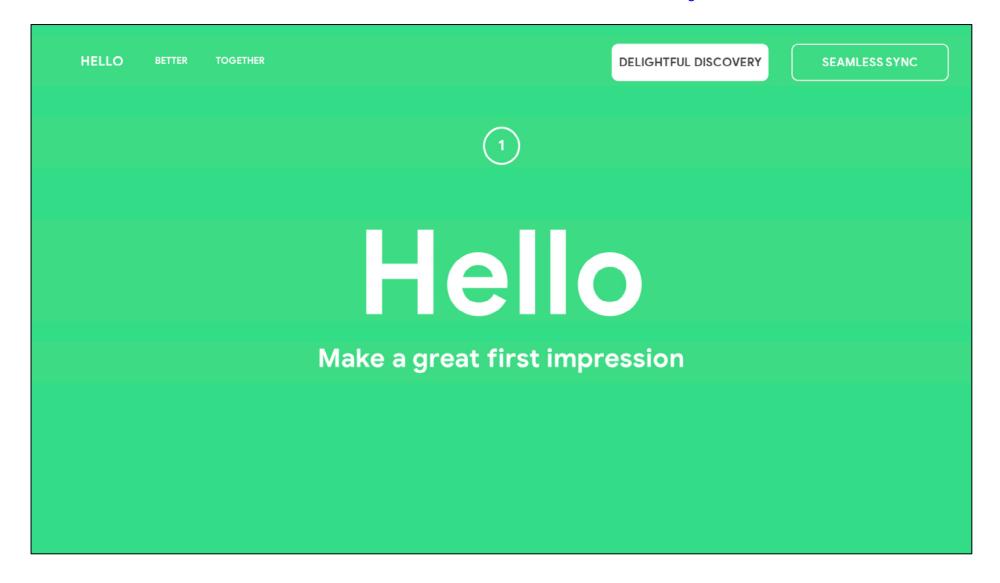
- Voiceover:
- Our x-functional team will walk you through three pillars to show you how....
- First, we need to make a great first impression



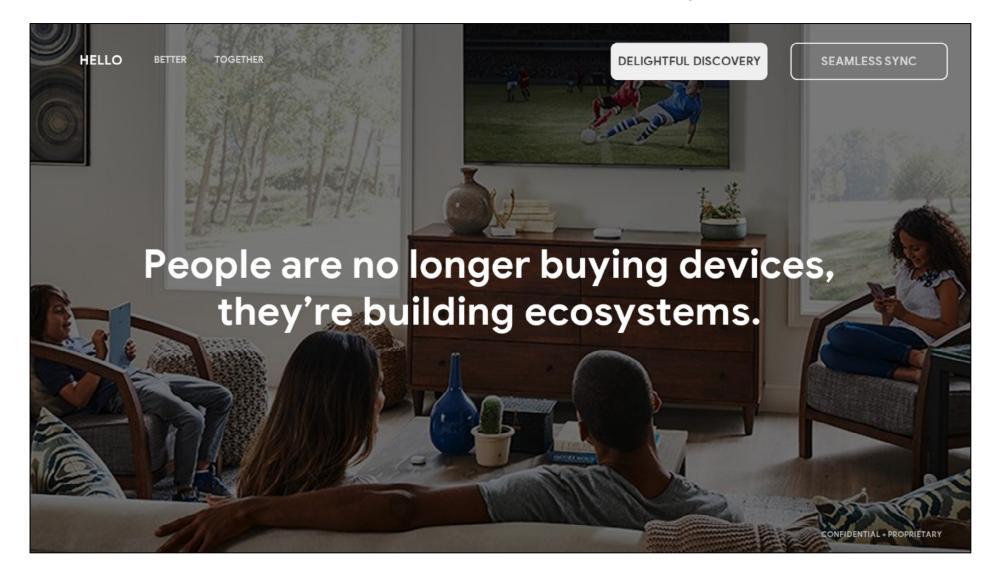
- Voiceover:
- Then, let's create cross-platform moments that delight our users



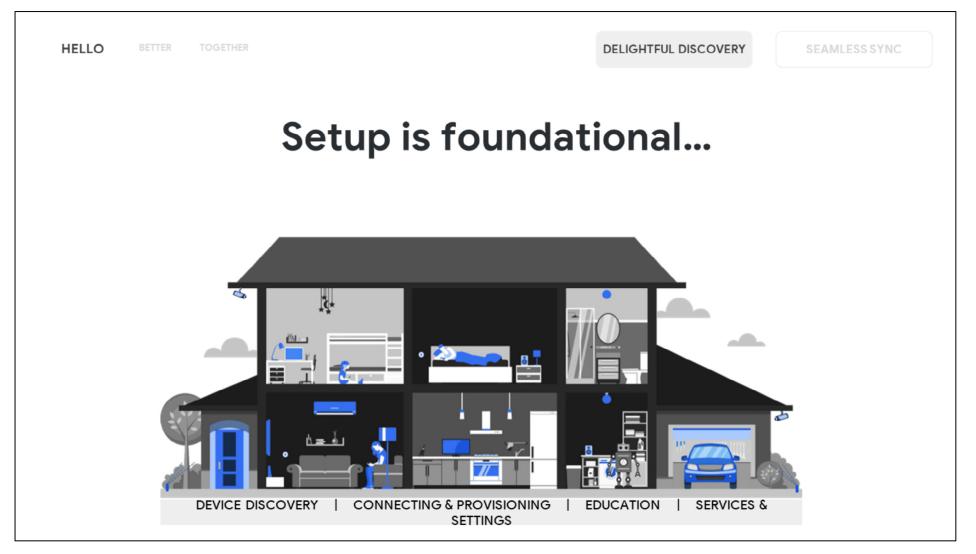
- Voiceover:
- And then deepening these cross-device connections to create an ecosystem our users can't imagine being without



- Thanks, Tim
- As Tim shared, myself, Shiba, and Marc will be discussing the first principle that foremost, we need to make a great first impression

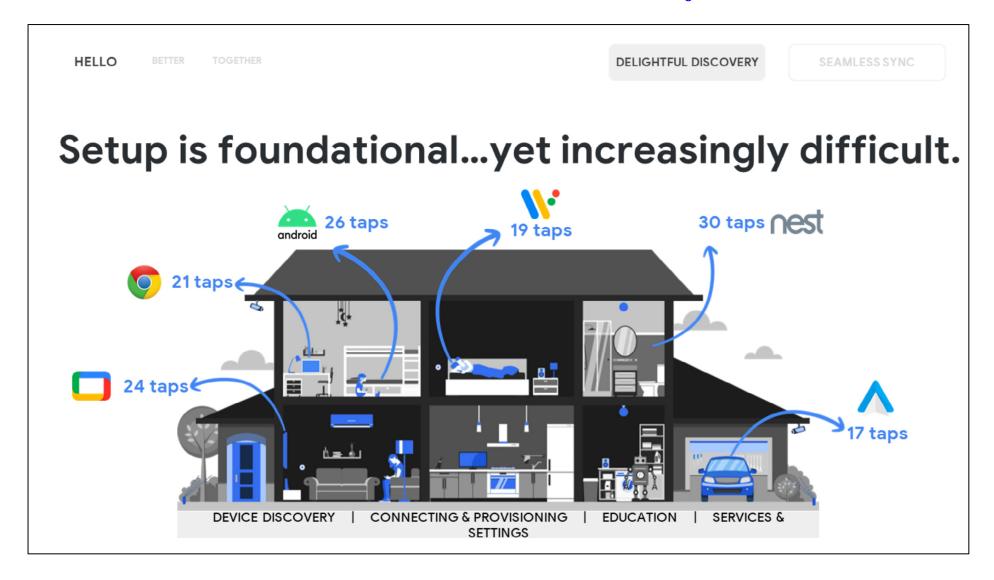


- People no longer think of devices as singular, standalone units, but as part of something larger
- They are looking for technology that not only makes their lives easier, but also fits into their existing network of devices
- In fact, "how well it connects to devices in my tech setup" is the #1 driver for people considering a new device
- Source

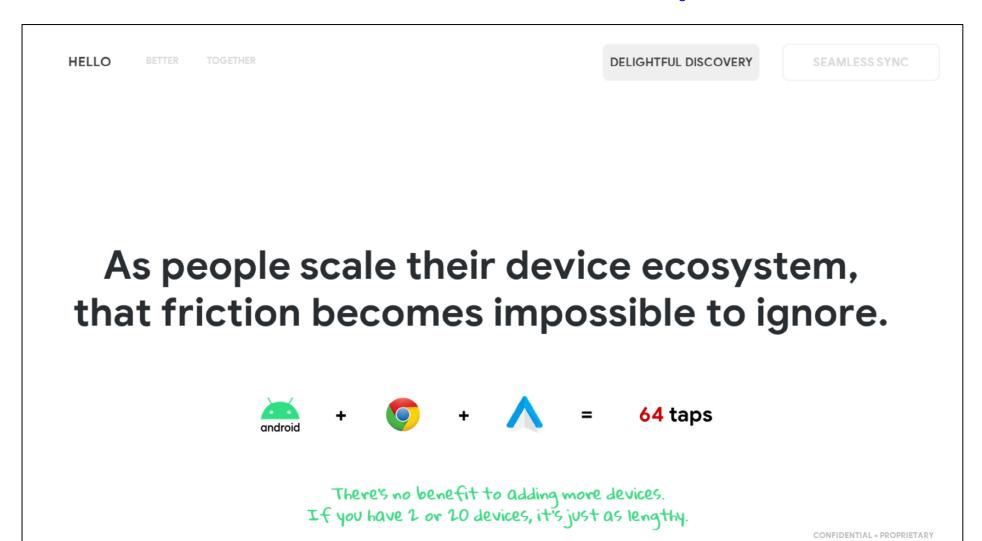


- When people invest their time, energy and money into a Google ecosystem device, we have limited opportunities to incite delightful discovery
  - Reasons a person might go on to appreciate their decision to join our ecosystem, to remain loyal to it, and even promote it to friends and family
- One such opportunity is setup, which is foundational to setting users up for long term success and satisfaction,
- Setup helps answer users questions around the four pillars shown at the bottom of this illustration, including...
  - Device discovery "What's being set up?"
  - Connecting & provisioning "Let's get it online"
  - Education "Teach me how to use it"
  - Services & settings "Personalize my device for me & my household"

GOOG-PLAY-002908322.R



- Despite the fact that setup is foundational, it's increasingly difficult to onboard to a single device, let alone to adopt our broader ecosystem
- Using (minimal necessary) taps as an example proxy, as device functionality has grown, so too has the time and effort needed to get that device set up
- This is not intended to pick on any one product area, but rather call attention to the increasing friction users face when adopting Google-powered technology



The fact is, as people scale their device ecosystem, that friction becomes impossible to ignore

Today, the more Google ecosystem devices a person purchases, the more frictionful setup becomes...

- o Again, using taps in the setup flow as an example proxy...
- Buy an Android phone, a Chromebook, and connect the former to your car, and these flows are cumulative (26+21+17 = 64 taps)
- This is undeniably Google's Achilles' heel, and it's finally time we did something about it

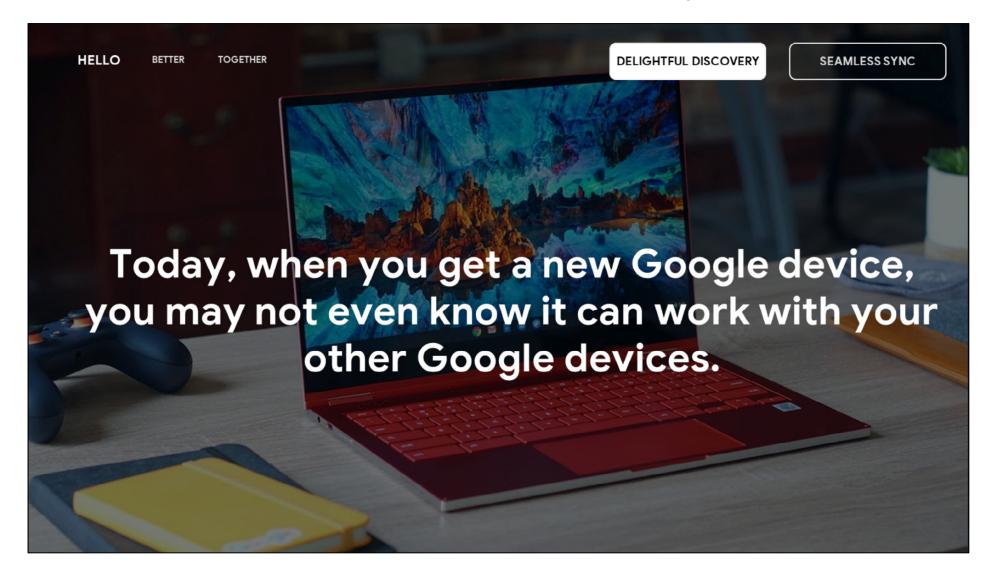
HELLO BETTER TOGETHER

#### How might we

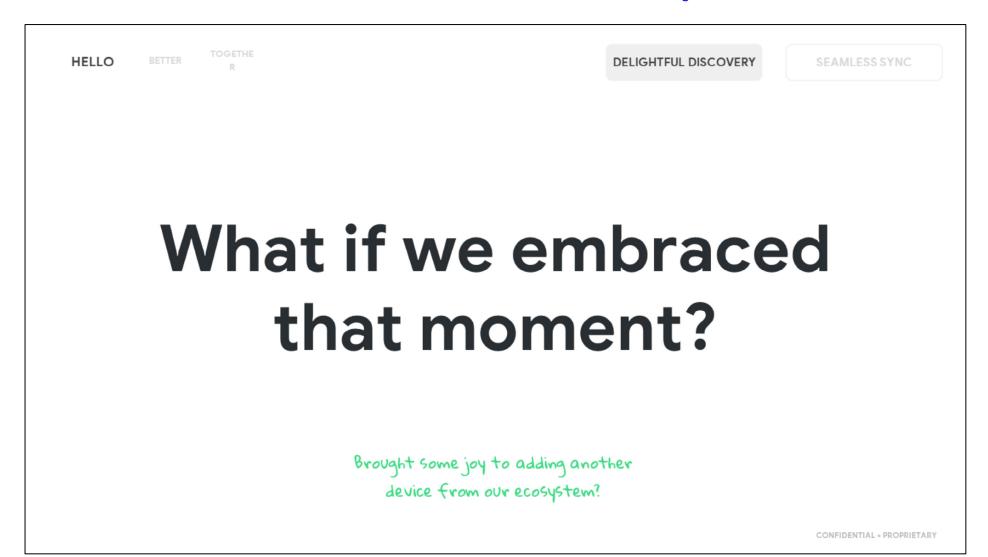
# Make new device setup our strength?

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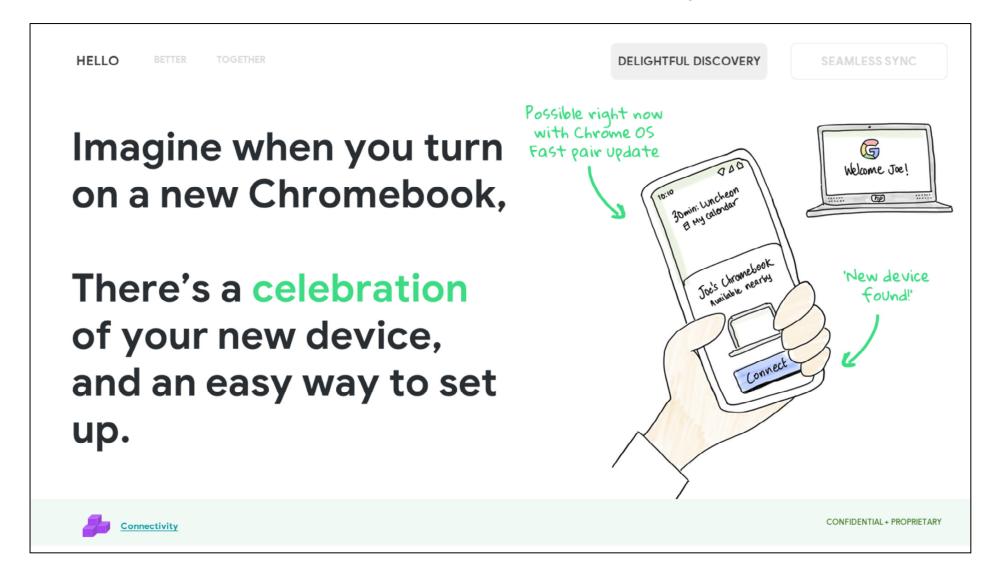
• So we ask... how might we make new device setup our strength?



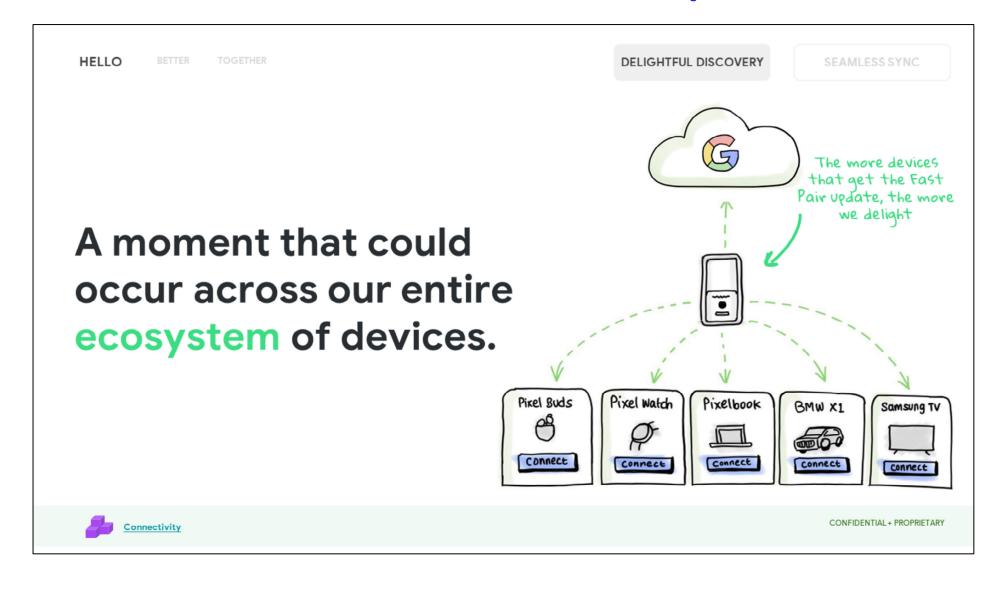
- Today, when you get a new Google device (eg. An Android TV or a Chromebook),
- you may not even know it can work with your other Google devices...



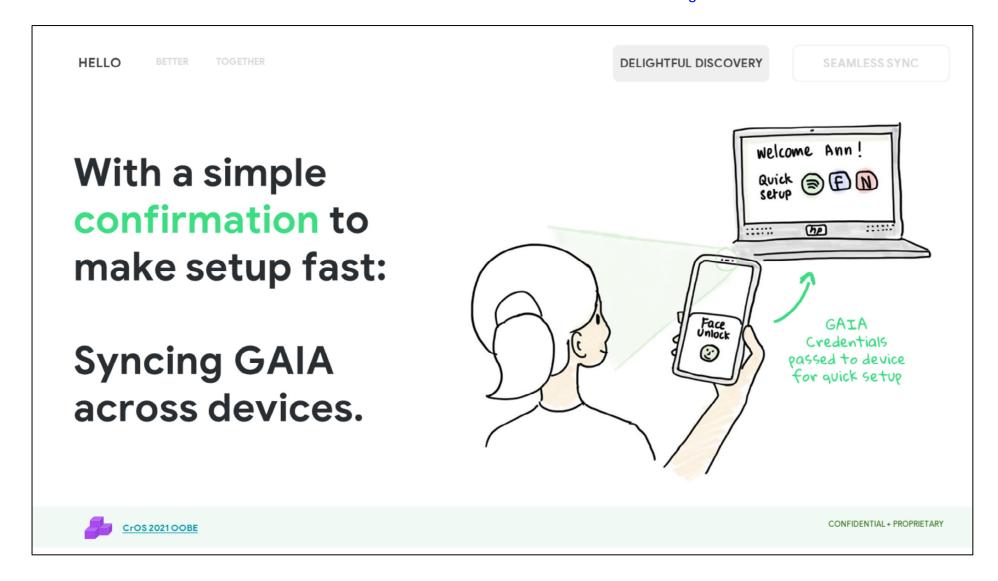
What if we embraced that moment, brought some joy to adding another device from our ecosystem



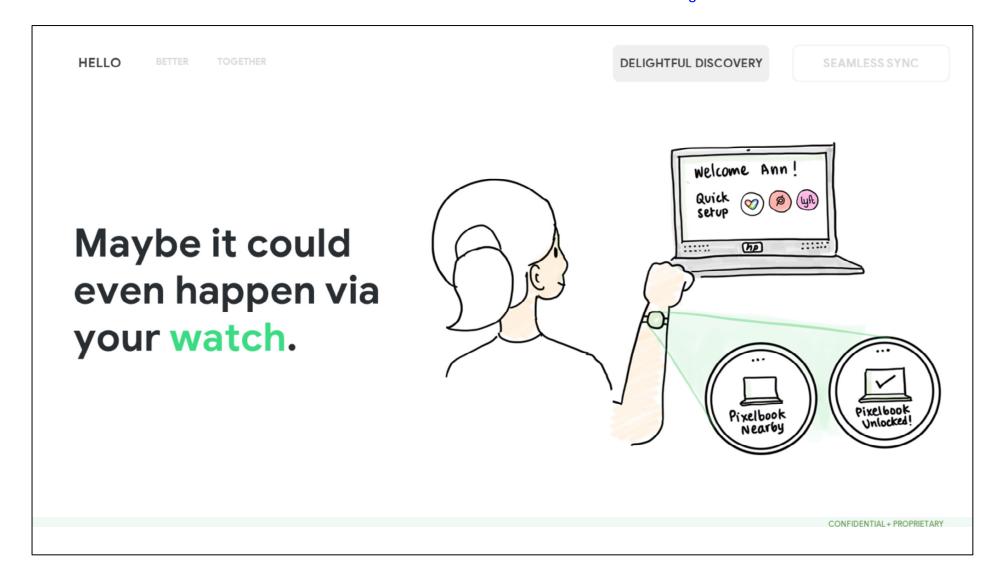
- For someone who already has an Android device, imagine when you turn on a new Chromebook to setup....there is a celebration of your new device.
- Implicitly establishing a relationship between them and reducing the number of steps it takes to get started!



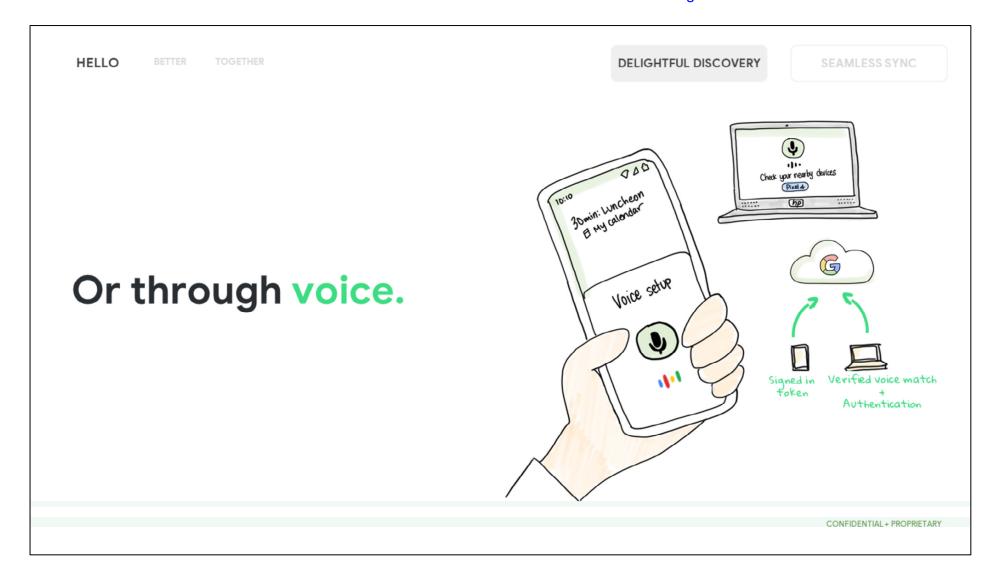
 The same moment that could occur across our entire ecosystem. So the next time you get a new device we build on the same experience...



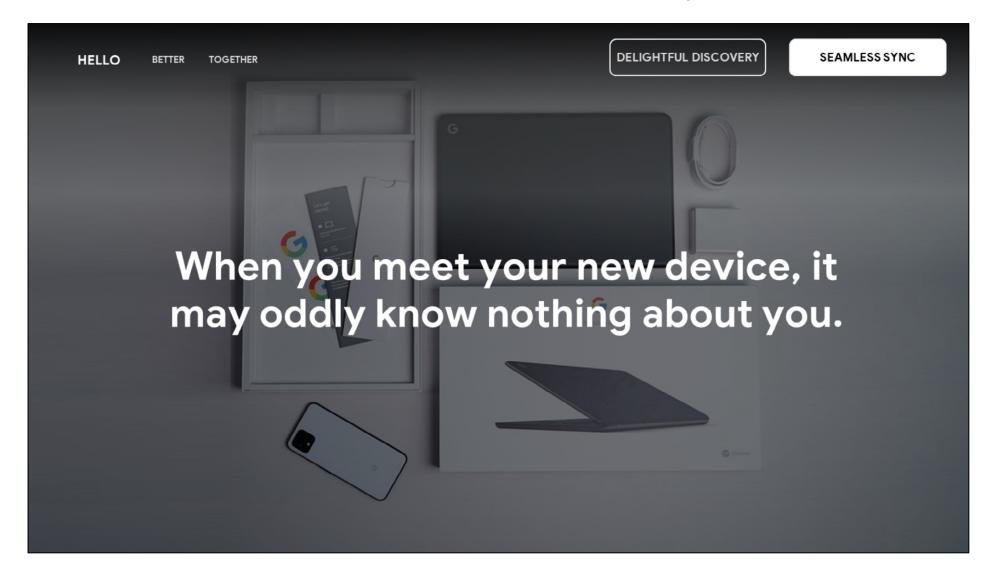
And in that moment, with a simple confirmation make setup fast and seamless: Syncing GAIA and installing apps that are optimised
for the new device you're setting up



• Why limit this to just the phone, maybe setup even via your watch?



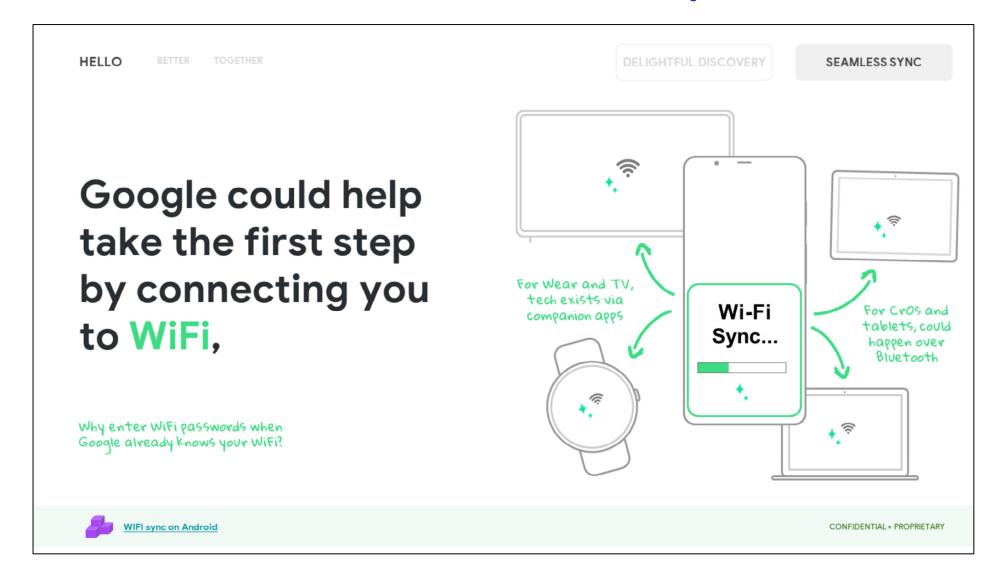
• Or maaaybe even through voice? Syncing our voice training model to setup any new device a user adds to Google ecosystem.



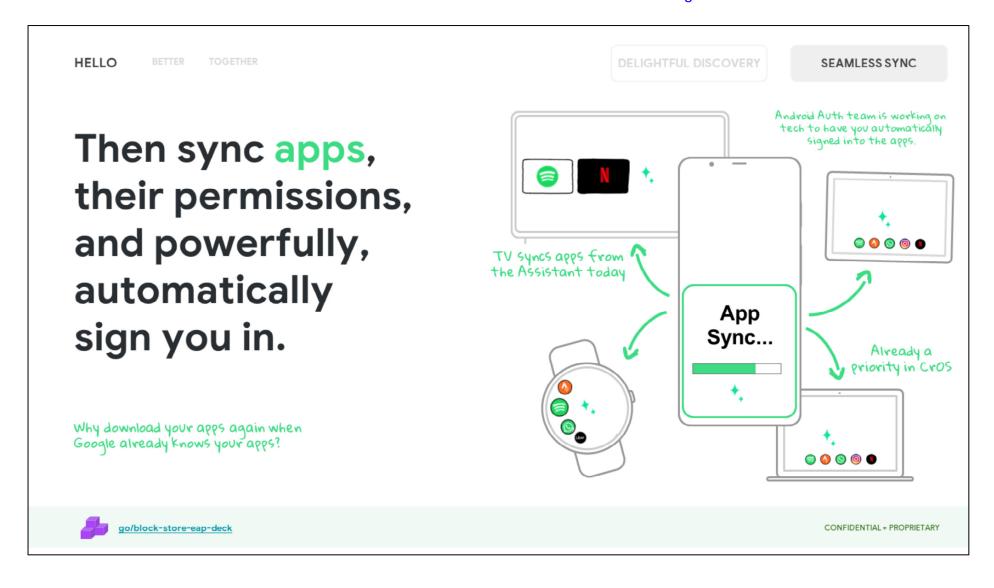
• After you connect with your device, it may oddly know nothing about you.

**HELLO** SEAMLESS SYNC What if like a good friend, Google remembered what you told it about you? CONFIDENTIAL + PROPRIETARY

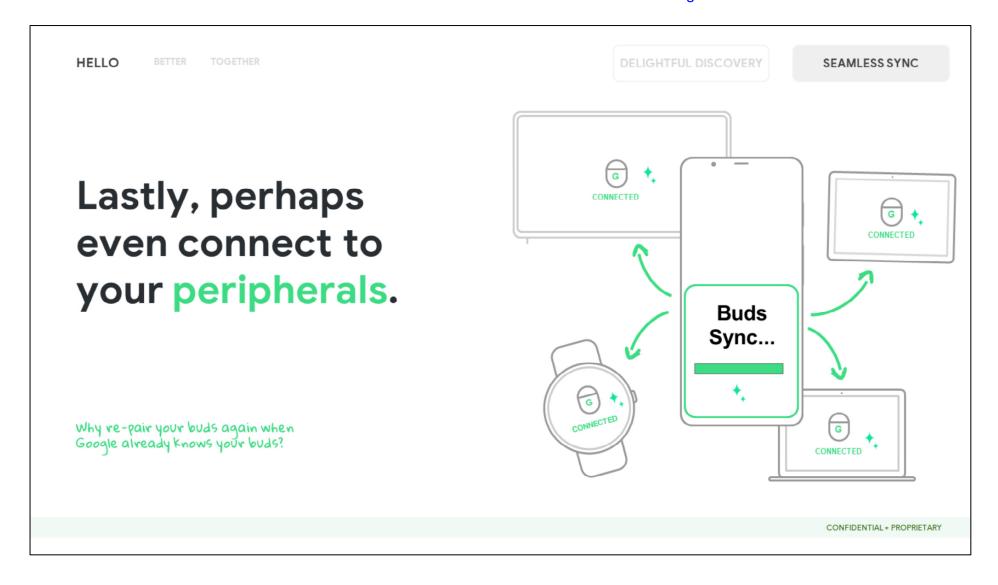
- What if like a good friend, Google remembered what you told it about you?
- A good friend remembers the secrets we tell them, why doesn't Google?
- (Michael DelGaudio from TV told us this, we could give him a shoutout when presenting)



What if Google could help you get connected by passing your Wifi credentials along



 And pass along your apps and permissions so you can immediately get started with your favorite services without having to find it, install it and log in



And set up seamless connections to your peripherals like the pixel buds

**HELLO** 

BETTER

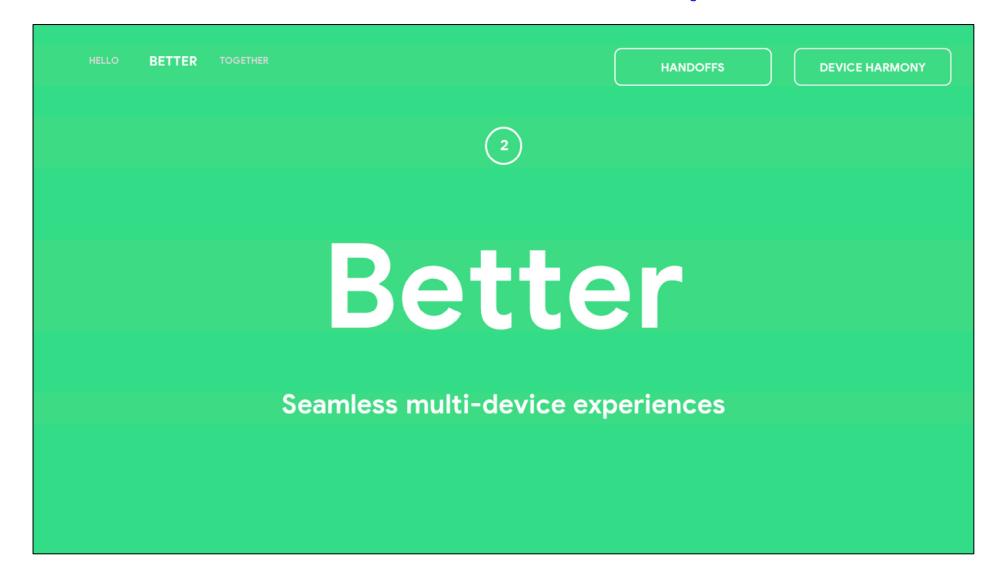
TOGETHER

**DELIGHTFUL DISCOVERY** 

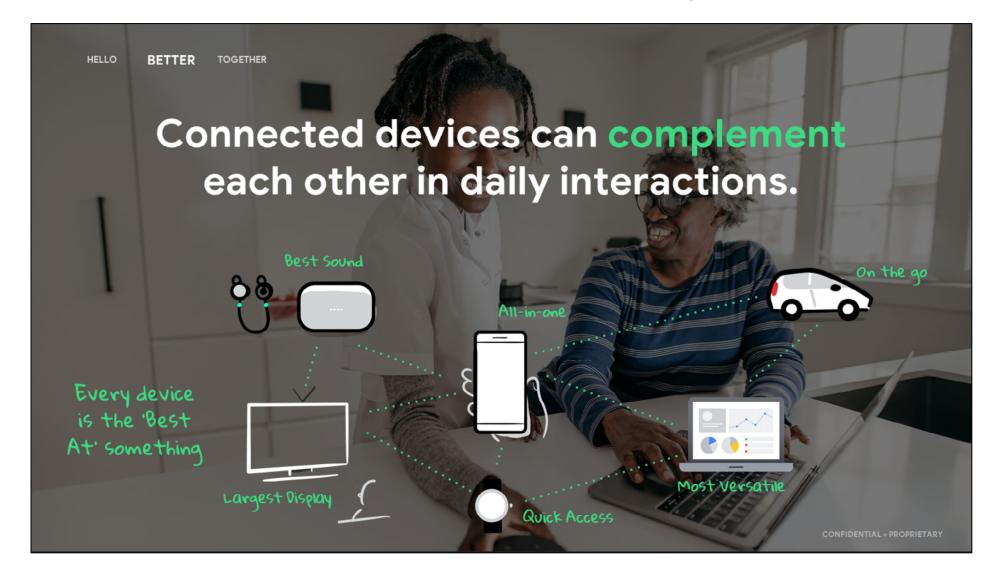
SEAMLESS SYNC

## A delightful first impression the moment a new Android device says Hello.

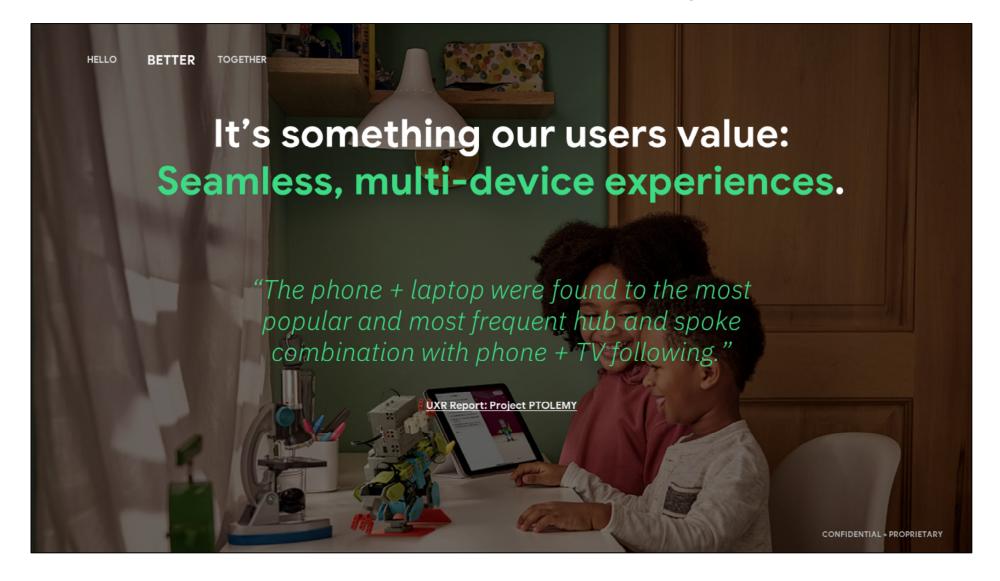
- We can make a delightful first impression.
- From the moment your devices recognize each other
- To delightful ways to authenticate users, from voice and biometrics, to simply using other authenticated devices like your Google watch
- We can seamlessly set up your peripherals like the pixel buds
- And even pass along your preferences, apps and permissions so there is nothing in the way of getting things done with all of your devices.



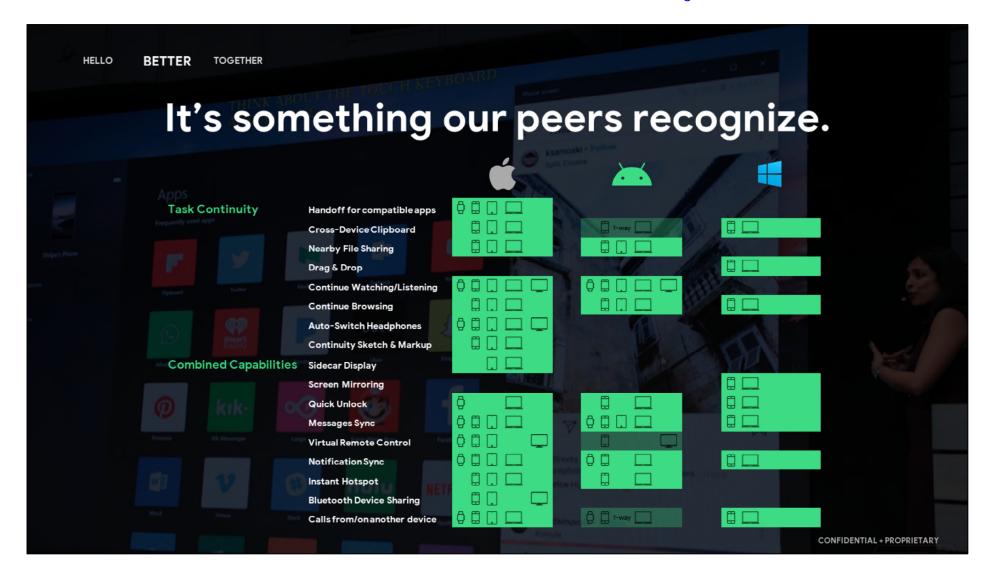
 Once we've established a solid connection between devices, this second pillar 'Better' is all about daily interactions users have across these devices



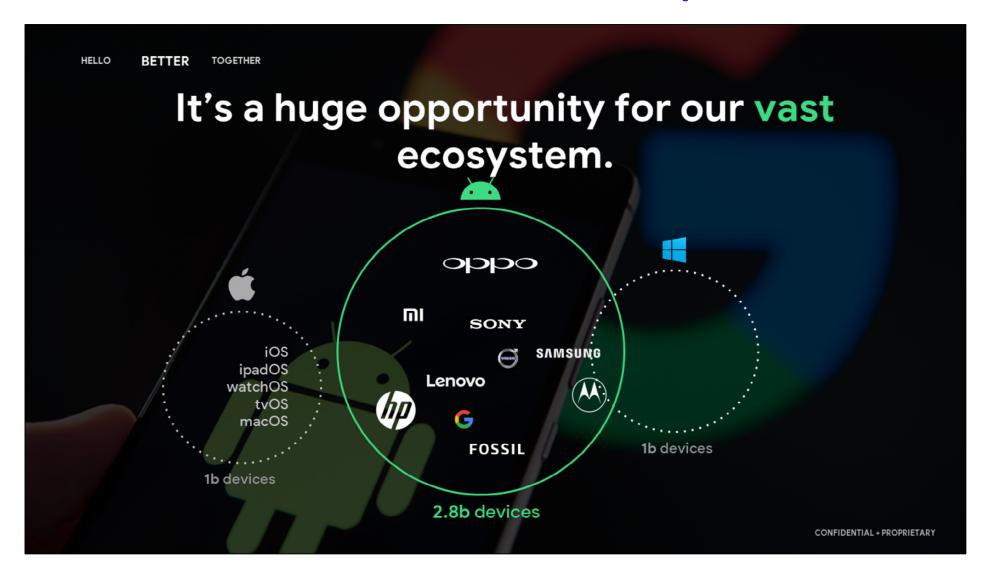
- A lot in this pillar is based on the simple recognition that every device is best at something
- So devices can complement each others capabilities



- What we see in UXR is that users value the comfort they get when they can move seamlessly between devices
- so hub and spoke relationships can emerge



- Obviously our competitors realize that as well
- While on the Apple end of the spectrum these experiences are super seamless
- In the Android world, we rely a lot on Chrome as a fallback, which is nowhere near as seamless
- And in some way Microsoft with their "Your Phone" app is doing a better job than we are in our own ecosystem.



- So these are small features individually but their aggregate value for users is a huge opportunity for our ecosystem
- Because there are billions of users that don't want to limit themselves to a single OEM
- The right features at the OS level could act like glue that makes our ecosystem stickier
- So how could these features like?

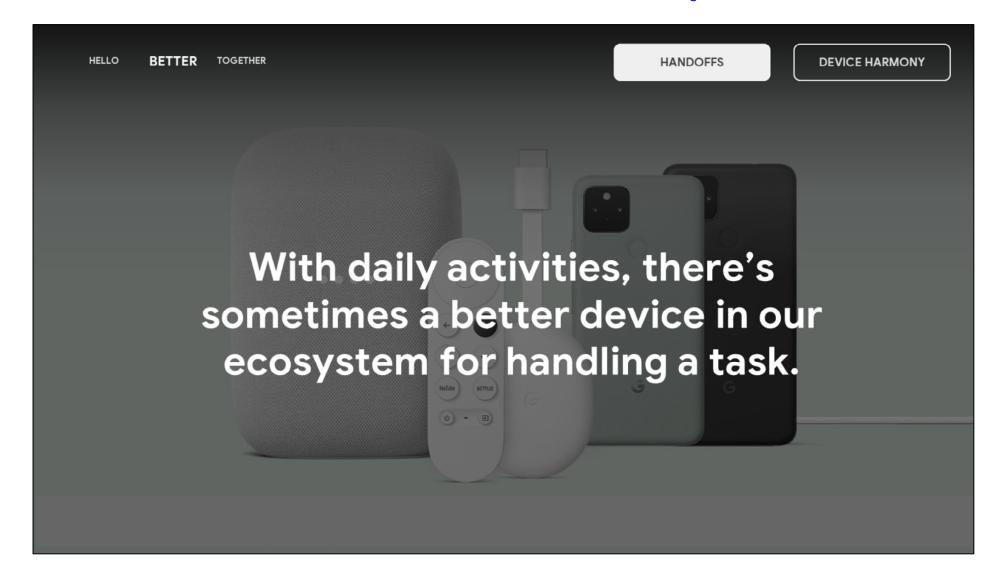
HELLO BETTER TOGETHER

## How might we

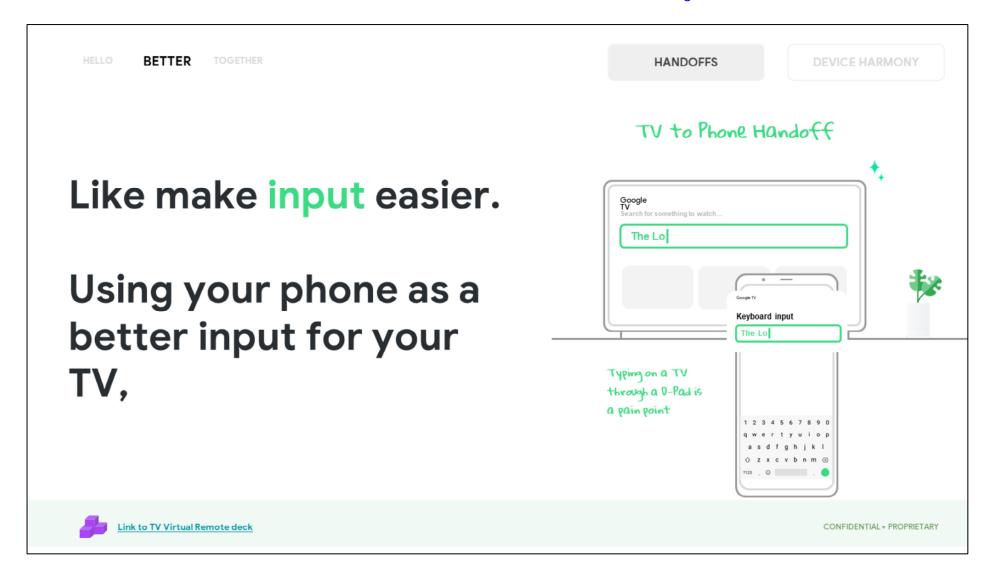
## Make our daily interactions better across multiple devices?

CONFIDENTIAL + PROPRIETARY

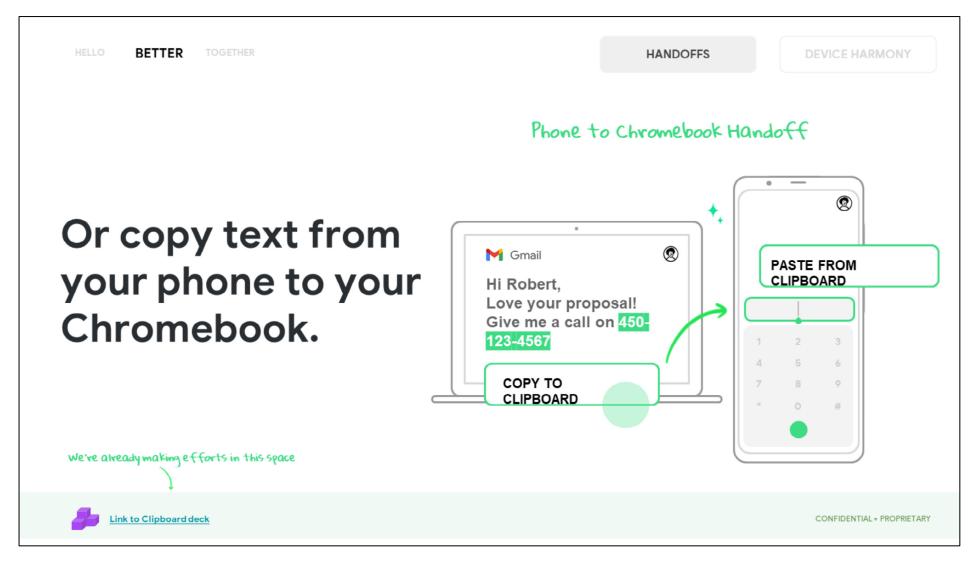
• HMW make daily interactions better across multiple devices?



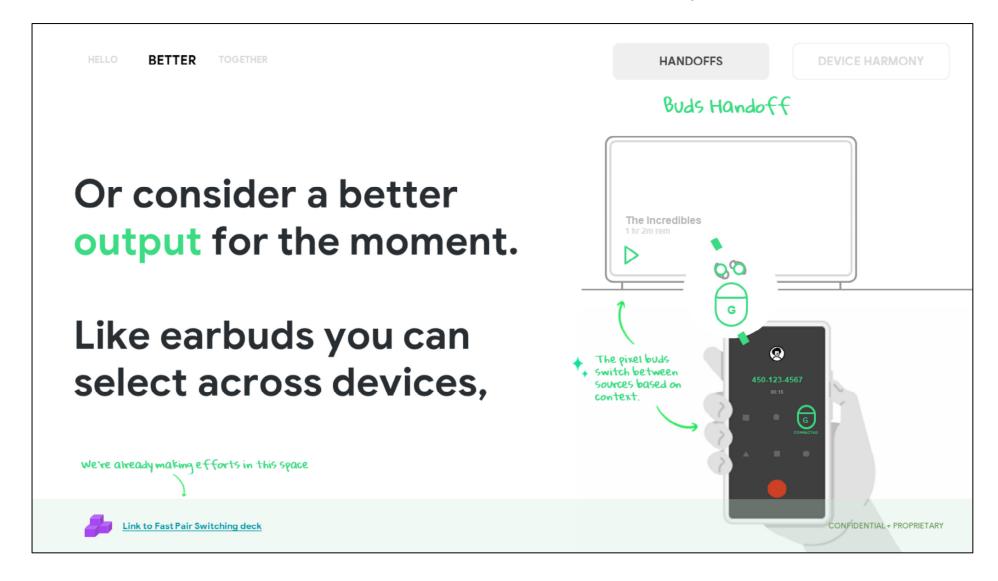
BETTER **HANDOFFS** What if we could provide users the ability to easily handoff tasks to another device? CONFIDENTIAL + PROPRIETARY

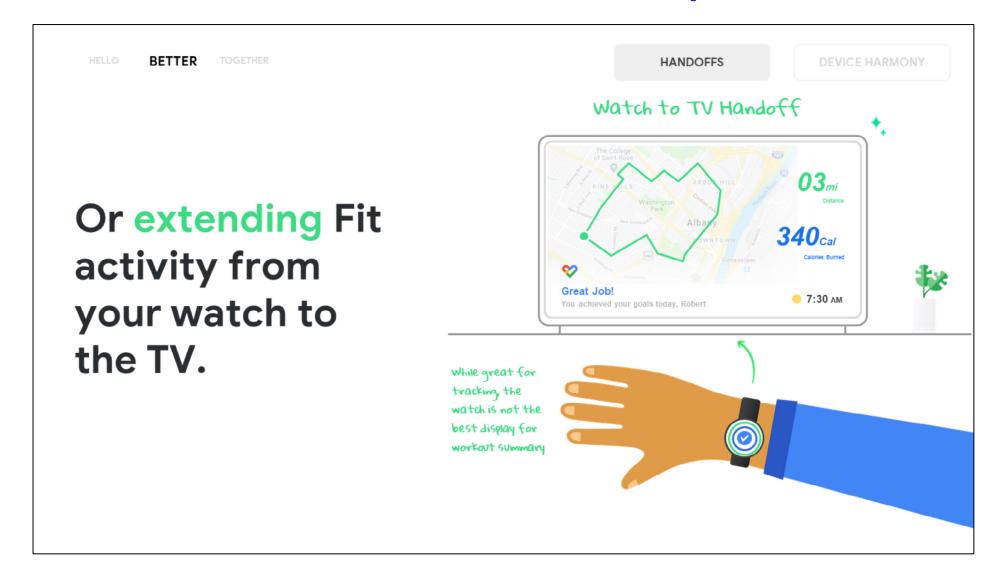


- Workout timw!
- Tv starts automagically
- HANDOFF
- Mention ongoing effort
- HANDO

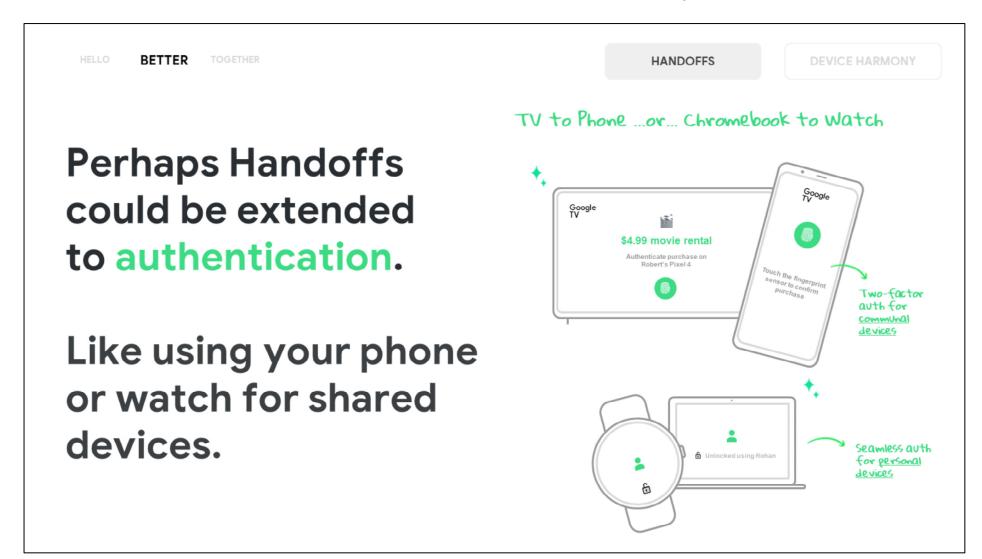


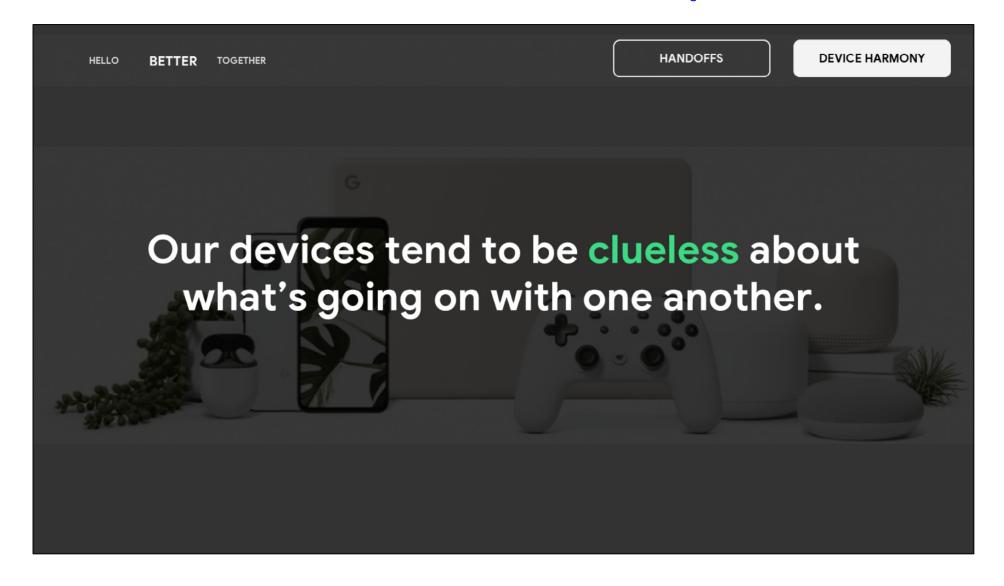
- Universal Clipboard
- Copy text on phone,
- paste on Chromebook
- (find the related deck in the
- Setting up for success sheets)

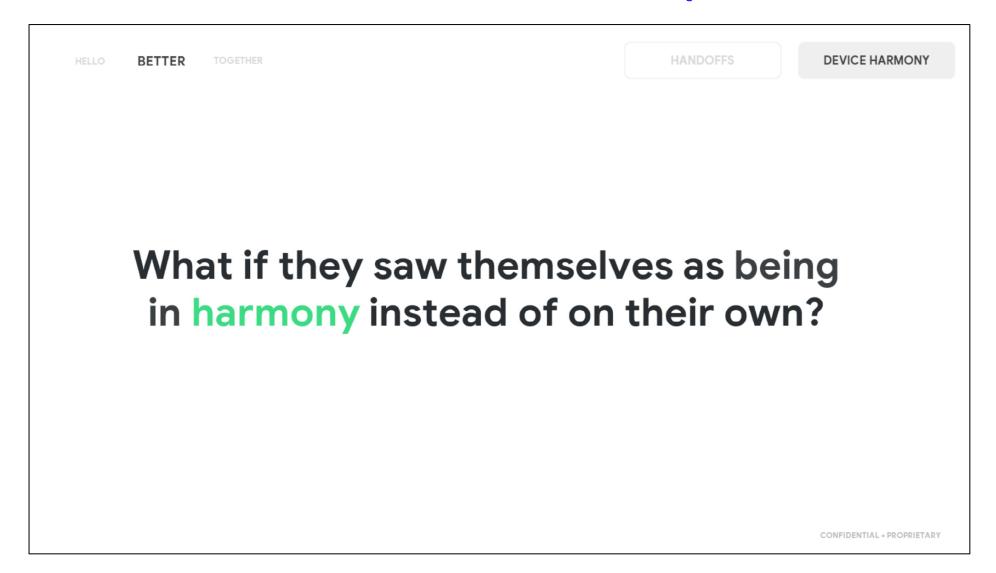


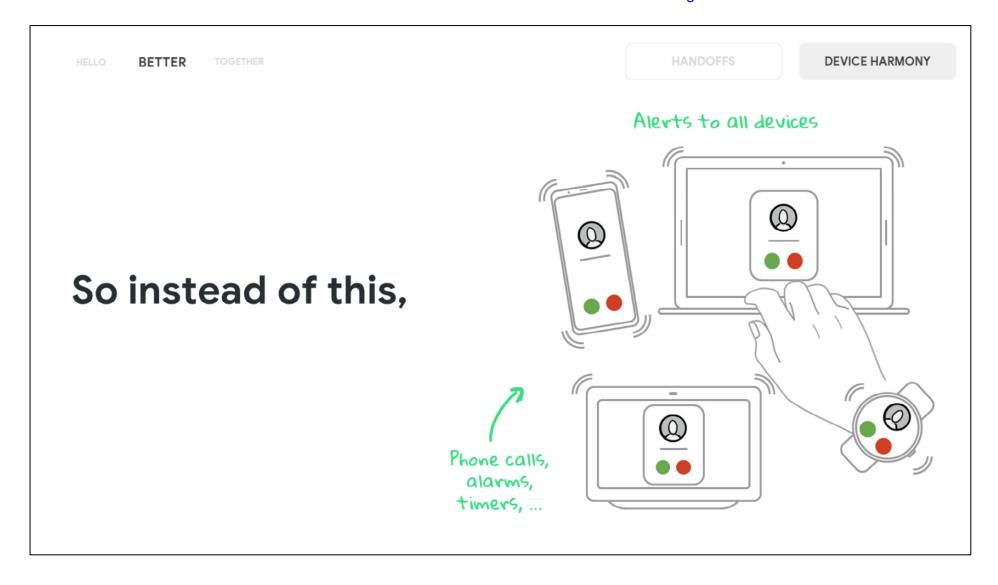


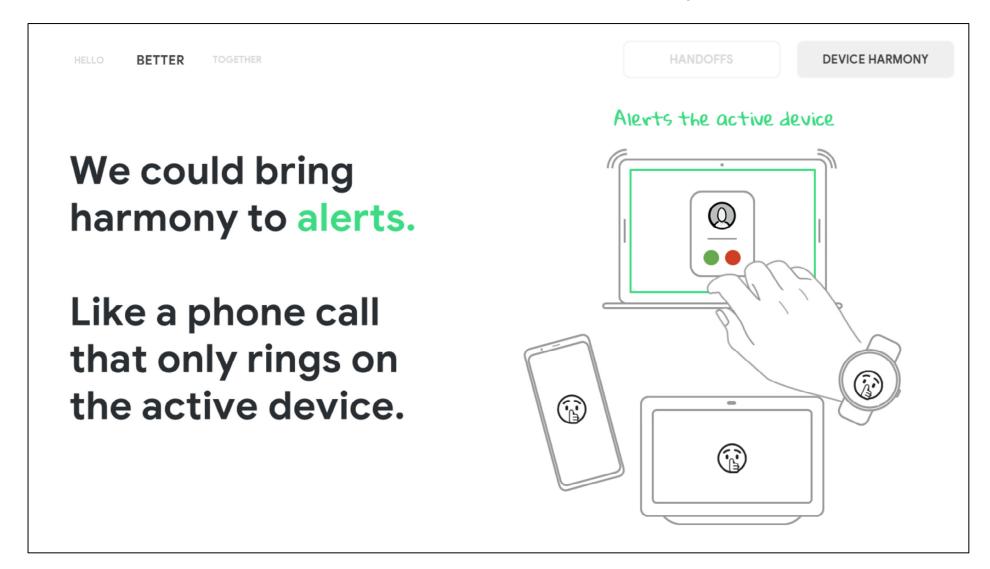
- Some of these use cases can be more on the delightful side than productivity
- You come home from a workout through your Fit watch > TV recognizes that and provides more value











**DEVICE HARMONY** BETTER Or simply, when one Pass Modes device is put in DND or Airplane Mode, We could extend that mode to other devices.

CONFIDENTIAL + PROPRIETARY

**DEVICE HARMONY** BETTER Or smartly, just Watch to DND. but adds to seamlessly adjust the experience through haptics to context. Phone to ONO Like reduce risky distractions when driving. Context is king! CONFIDENTIAL + PROPRIETARY

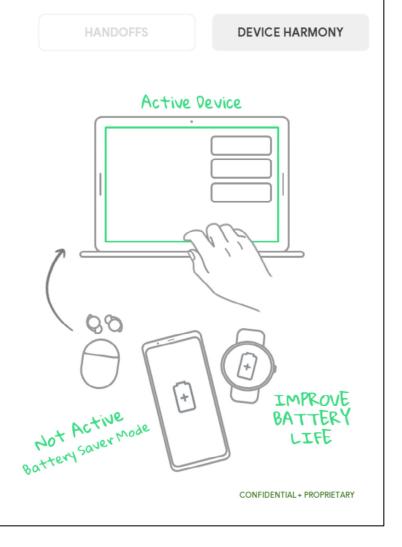
HELLO

**BETTER** 

OGETHER

If our ecosystem knew what's active,

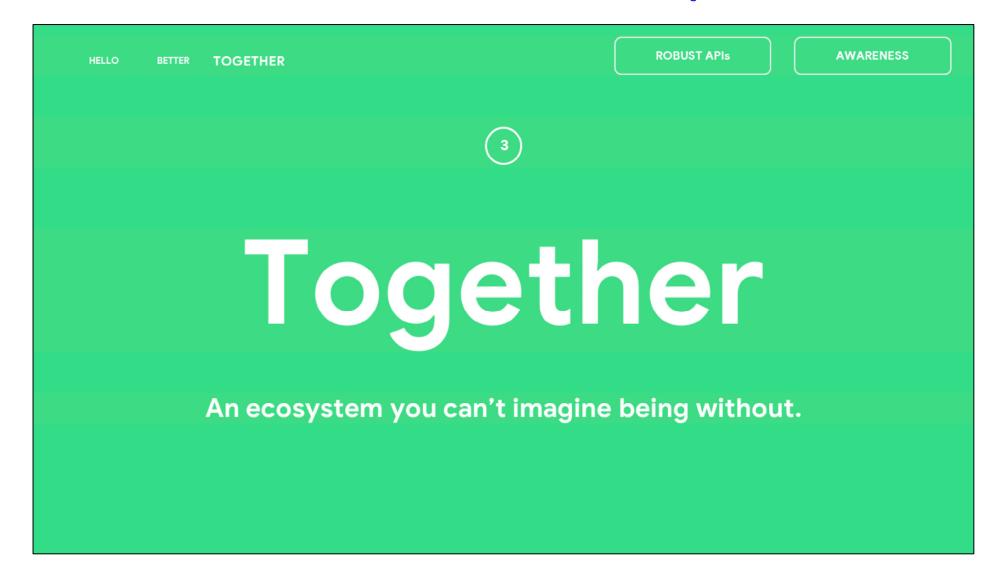
We could even put others to sleep, extending battery life from hours to days.



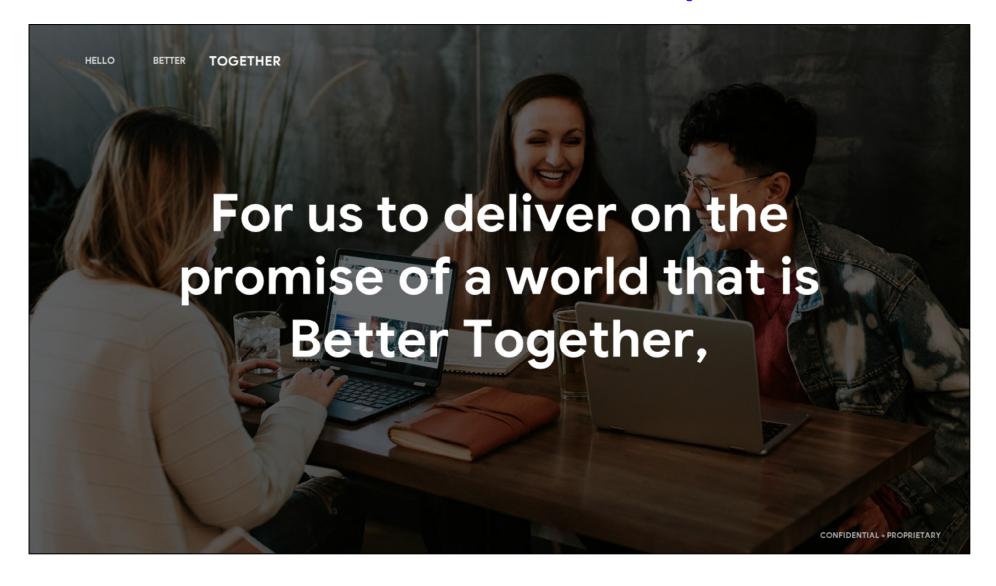
HELLO BETTER TOGETHER DEVICE HARMONY

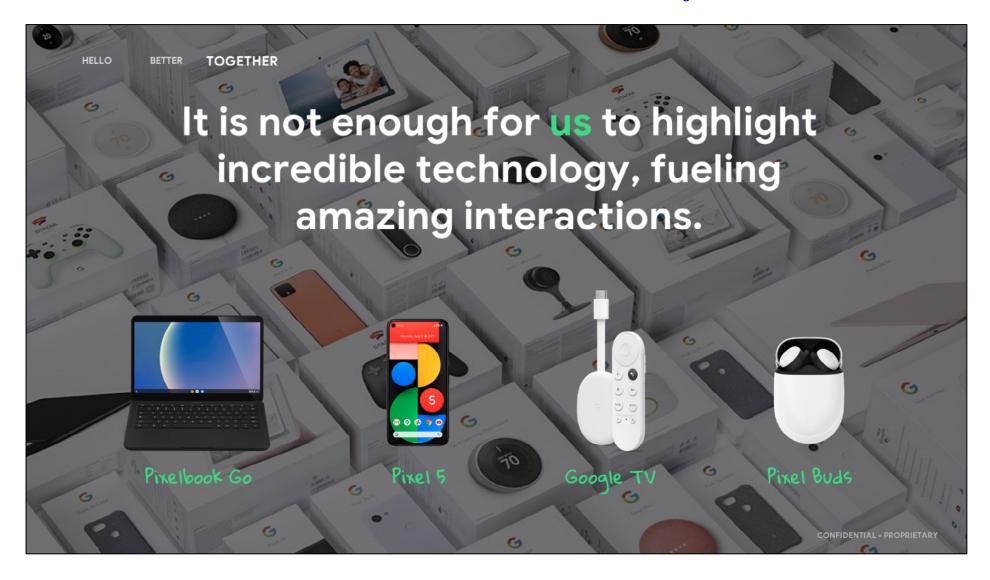
## We can make daily tasks better when we bring continuity with the other devices in our ecosystem.

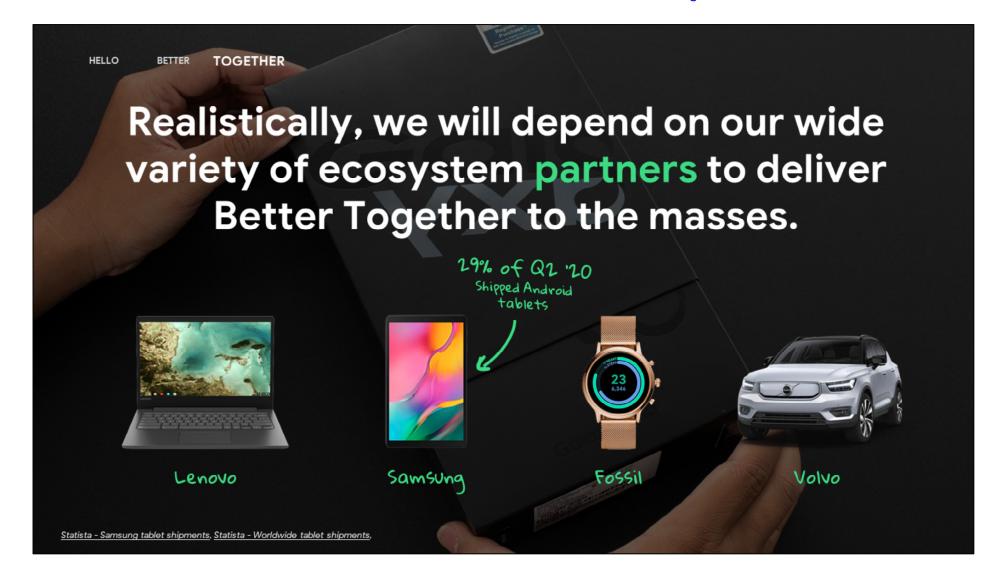
CONFIDENTIAL + PROPRIETARY



• An ecosystem you can't imagine being without.







- Realistically we will depend on our ecosystem partners to deliver the punch of Better Together to the masses. And also to be able to justify our investments.
- https://www.statista.com/statistics/299618/tablet-shipments-samsung/ 7 Mil Q2 '20
- https://www.statista.com/statistics/273268/worldwide-tablet-sales-by-operating-system-since-2nd-quarter-2010/ 23.6 Mil Q2 '20
- https://docs.google.com/presentation/d/1fXvuFg3uhNB3lPgY7lpE2 hf0 NSo7D6bwtiRvxVms8/edit#slide=id.g40439a9937 2 1210

HELLO BETTER TOGETHER

How might we

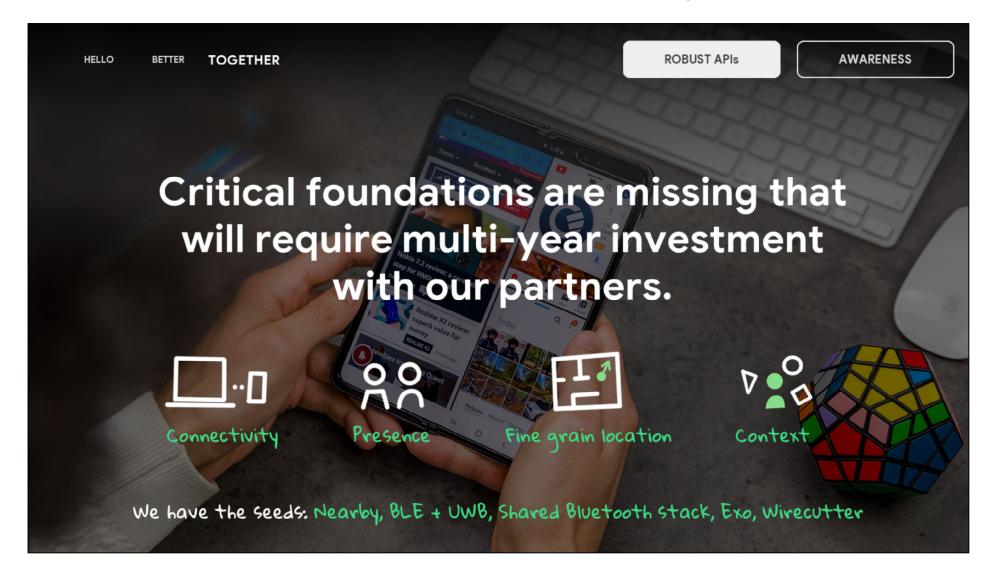
# Build momentum together with our diverse partners?

Justify our longer term investments

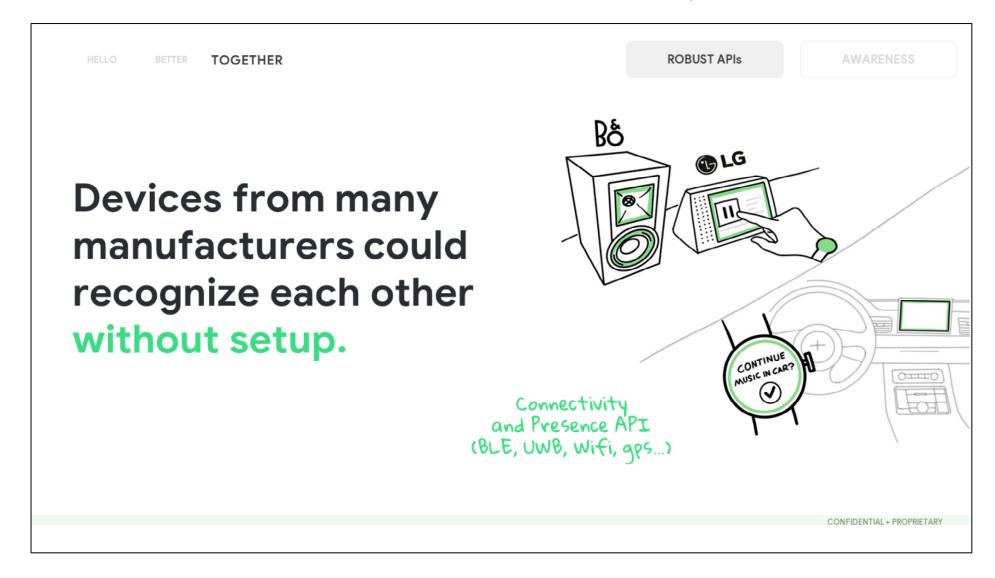
Strengthen the ecosystem as a whole

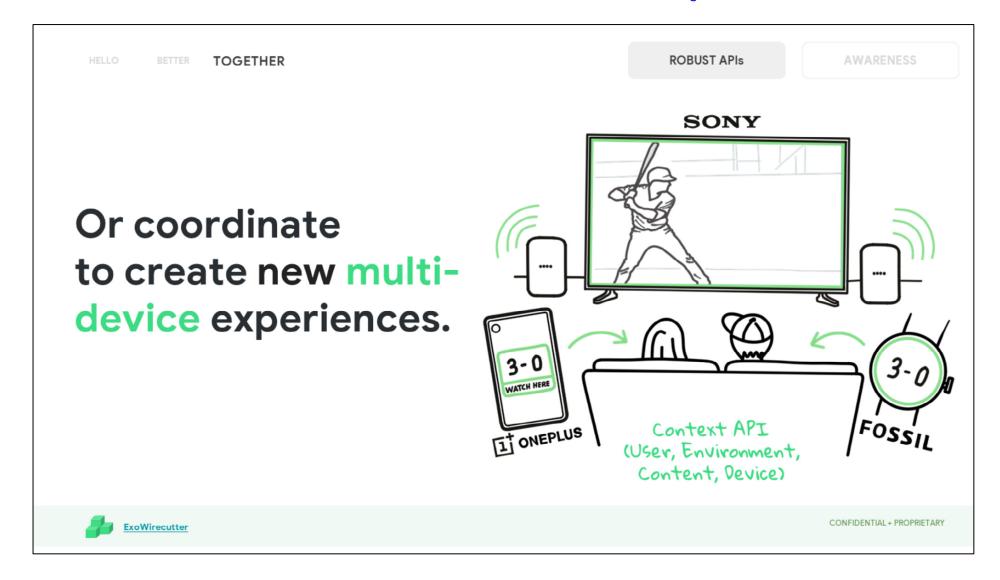
Lessen fragmentation

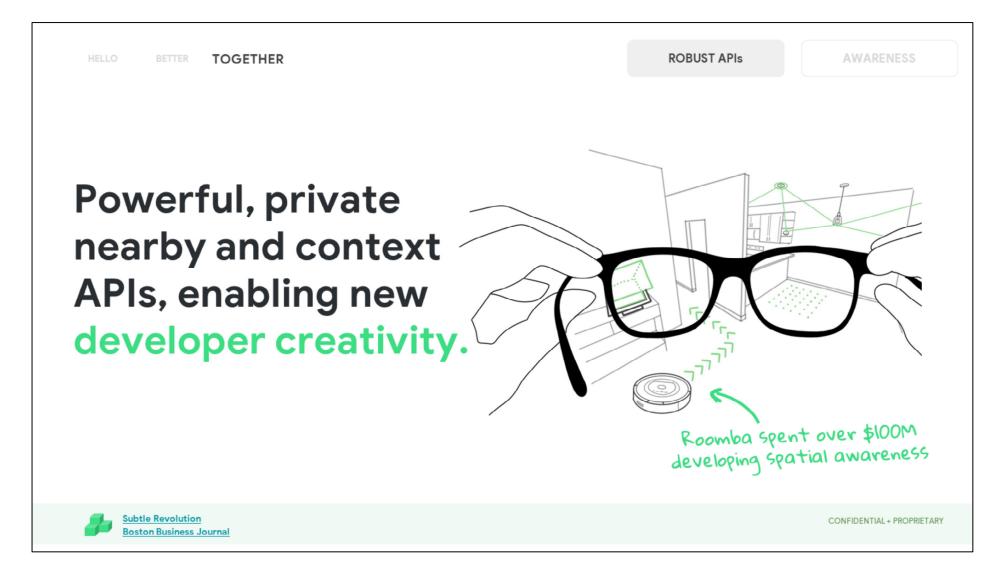
CONFIDENTIAL + PROPRIETARY



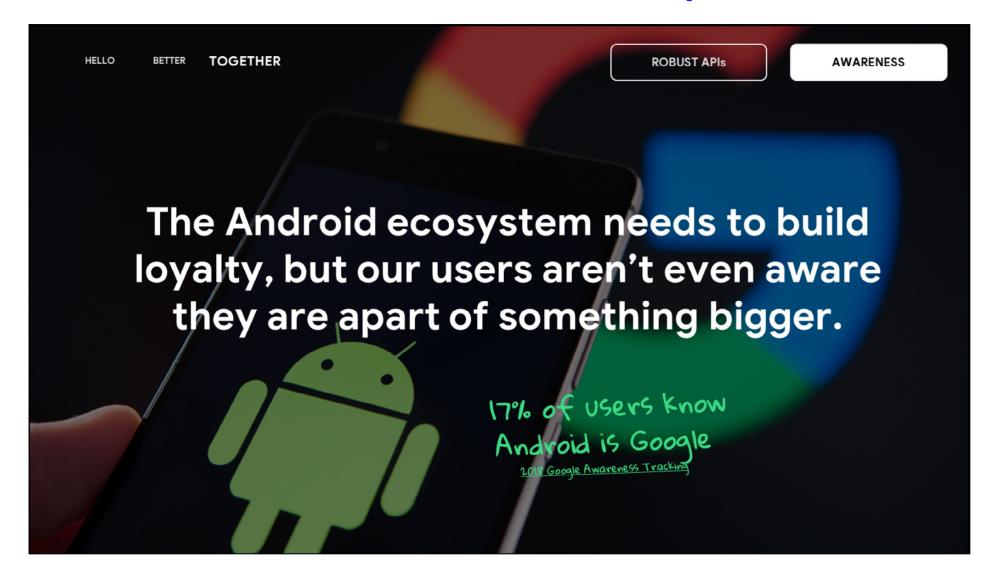
**ROBUST APIs** TOGETHER What if even partner devices knew when they could work together with the help of Robust APIs? CONFIDENTIAL + PROPRIETARY





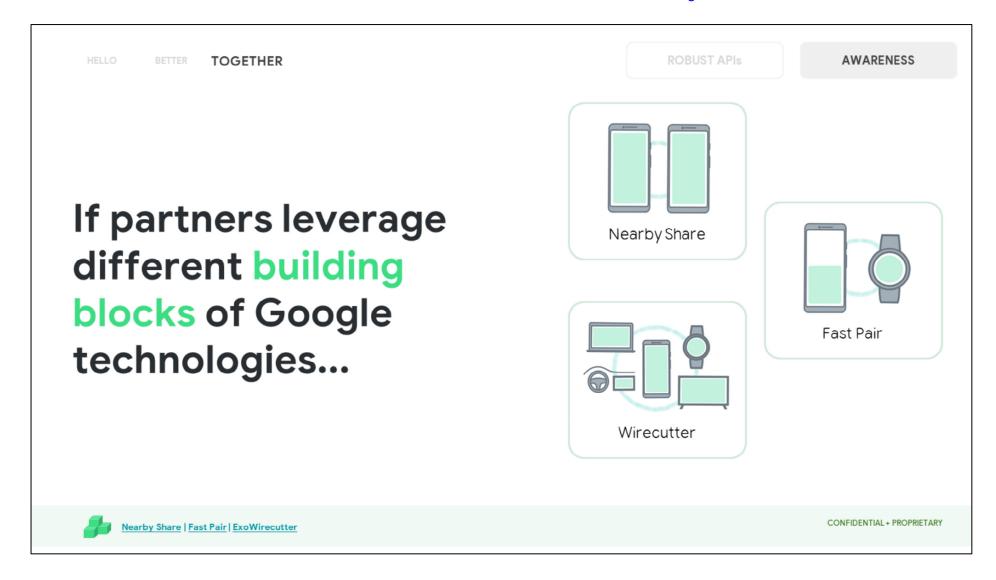


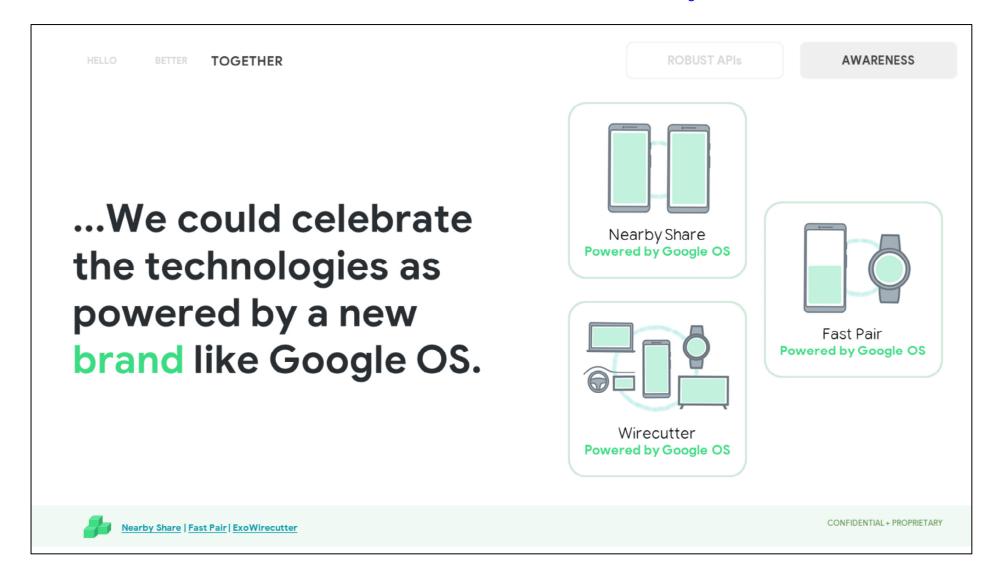
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- https://www.bizjournals.com/boston/blog/techflash/2015/09/irobots-smartest-robotic-vacuum-debuts-after-well.html#:~:text=Angle%20said%20%22well%20over%22%20%24100,field%20of%20robotic%20mapping%20technology.

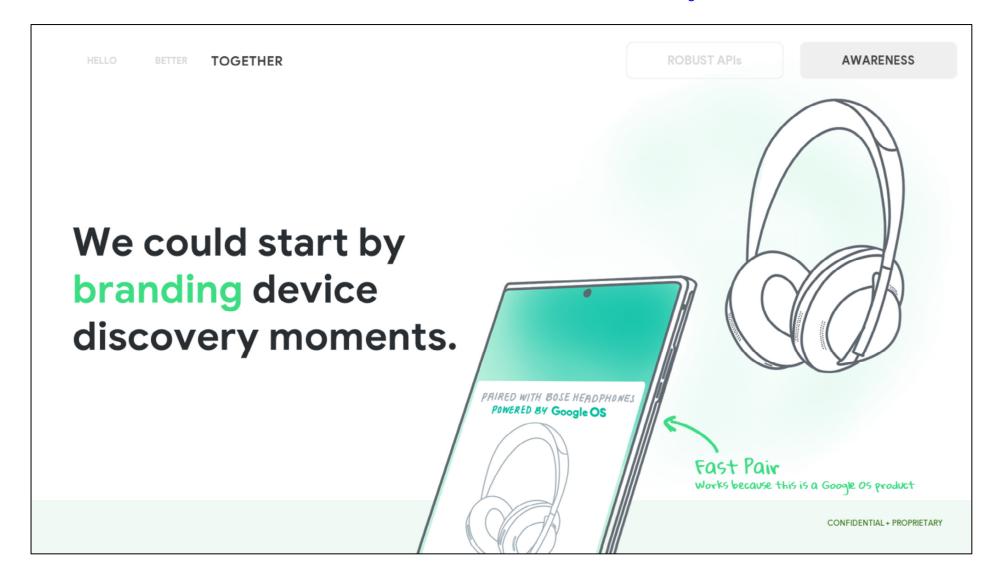


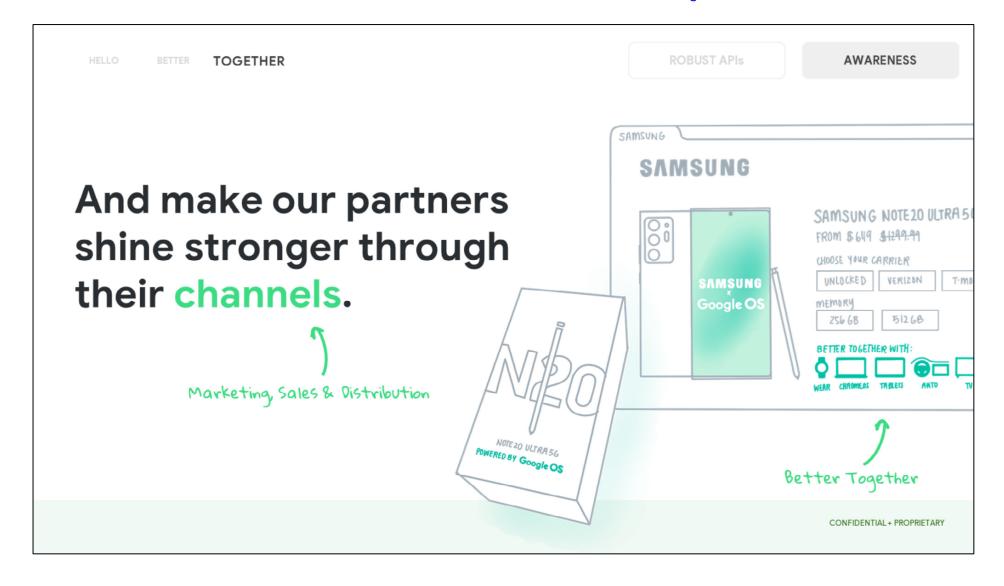
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- 2015 <a href="https://docs.google.com/presentation/d/1n1p">https://docs.google.com/presentation/d/1n1p</a> <a href="https://docs.google.com/presentation/d/1n1p">H9qJ1adxg2Z1hBqy-gP3yWmAdAD6gLULRdBPm8U/edit#slide=id.g3586d2045</a> <a href="https://docs.google.com/presentation/d/1n1p">09</a>

**AWARENESS** TOGETHER What if we brought our ecosystem together by increasing awareness of Better Together experiences? CONFIDENTIAL + PROPRIETARY

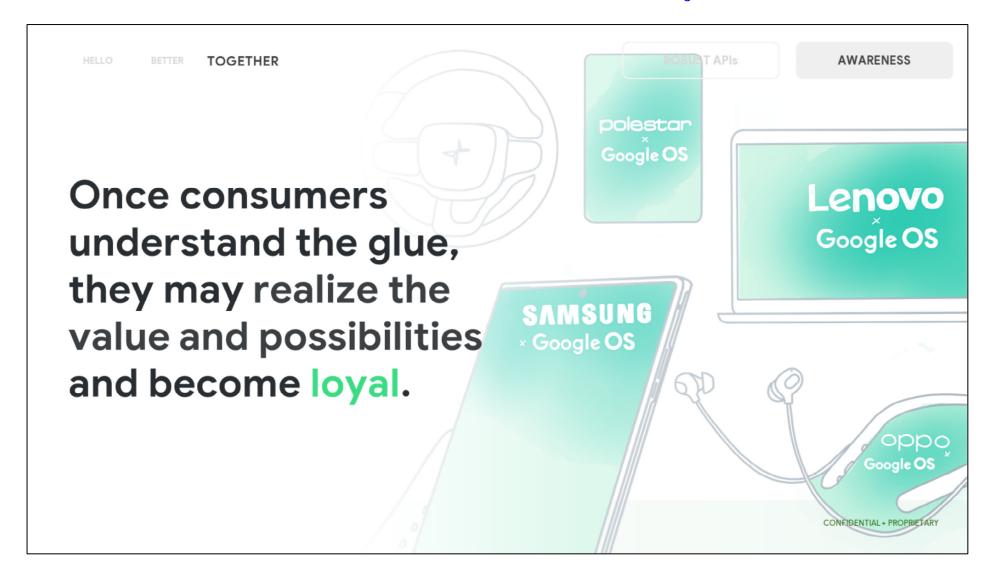








- (purchase flow marketing, works with many devices, support for X years)
- And even on purchase flows and show how that it works better together with other devices too,



HELLO BETTER TOGETHER

## To succeed, we need to build momentum together with our partners.

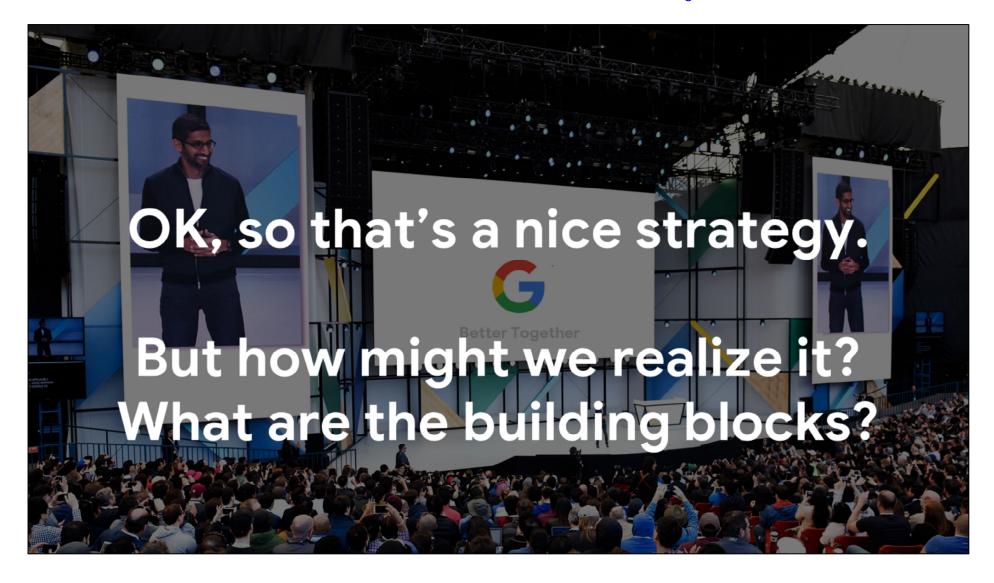
Invest in foundational building blocks

Tell the story to our consumers

#### Here To There

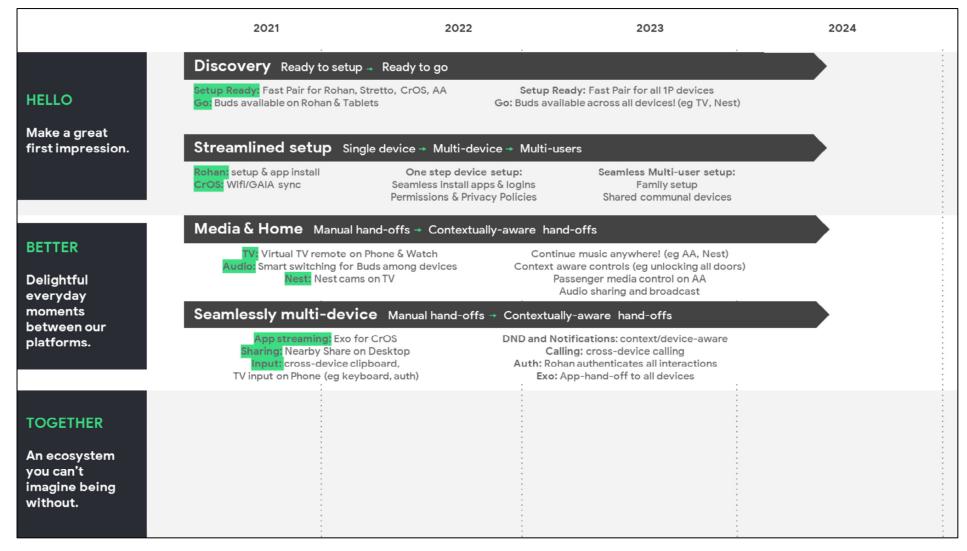
**Technical roadmap** 

• An ecosystem you can't imagine being without.

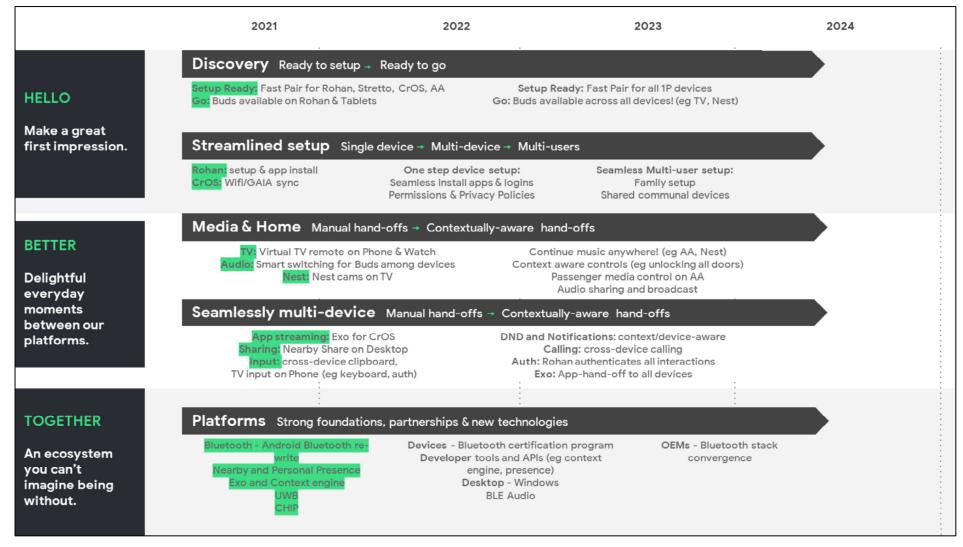


	2021	2022	2023	2024
	Discovery Ready to setup			
HELLO	Setup Ready: Fast Pair for Rohan, Go: Buds available on Rohan & Tab		ady: Fast Pair for all 1P devices able across all devices! (eg TV, Nest)	
Make a great first impression.	Streamlined setup Sin	gle device → Multi-device → Multi-us	ers	
	Rohan: setup & app install CrOS: Wifi/GAIA sync	One step device setup: Seamless install apps & logins Permissions & Privacy Policies	Seamless Multi-user setup: Family setup Shared communal devices	
BETTER				
Delightful everyday				
moments between our platforms.				
TOGETHER				
An ecosystem you can't imagine being				
without.				

- There are a whole host of solutions we provided here, and we tried to organize it and see how we can build against this end goal and parallelize some of this investments in a way that each progression builds on one another
- This also helps to see what clams we can make along this journey based on the experience and hardware we enable.
- Reference: Seamlessly Multidevice (from <a href="https://docs.google.com/presentation/d/1XYs9SwWwwNTj\_rWRgHnb9rMvN4XN5e-JAP5OLUiE6js/edit#slide=id.g95af7c5369\_0\_509">https://docs.google.com/presentation/d/1XYs9SwWwwNTj\_rWRgHnb9rMvN4XN5e-JAP5OLUiE6js/edit#slide=id.g95af7c5369\_0\_509</a>)



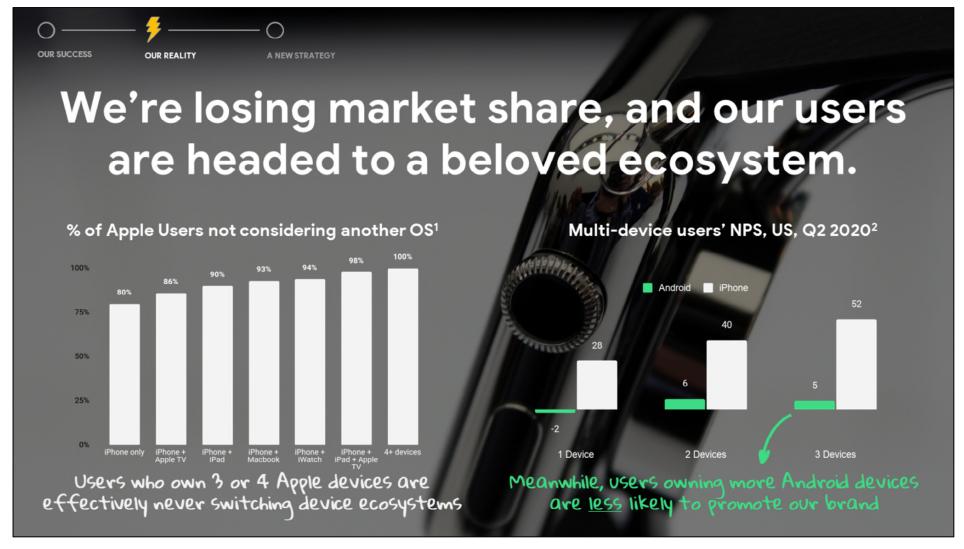
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### Summary

An ecosystem you can't imagine being without.



- Voiceover:
- We're losing users to Apple's beloved and sticky ecosystem, and the effects grow the more devices a user buys
- Over 95% of users who own 3 or more Apple device won't consider switching phone OSs
- While users owning multiple Android devices are actually less likely to promote the Android brand!
- Sources:
- Android Staples, 2019Q4 via Asymco, Cantar, Apple Public Reports # of users not considering another OS for their next phone purchase
- Kantar, Q2 2020 more Android devices owned means flat NPS

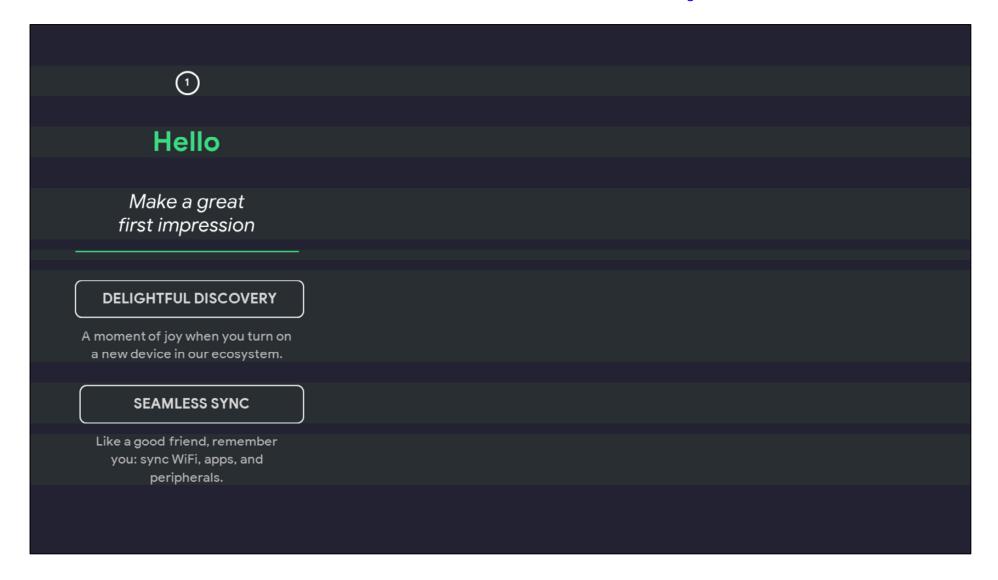
### How might we turn this around?

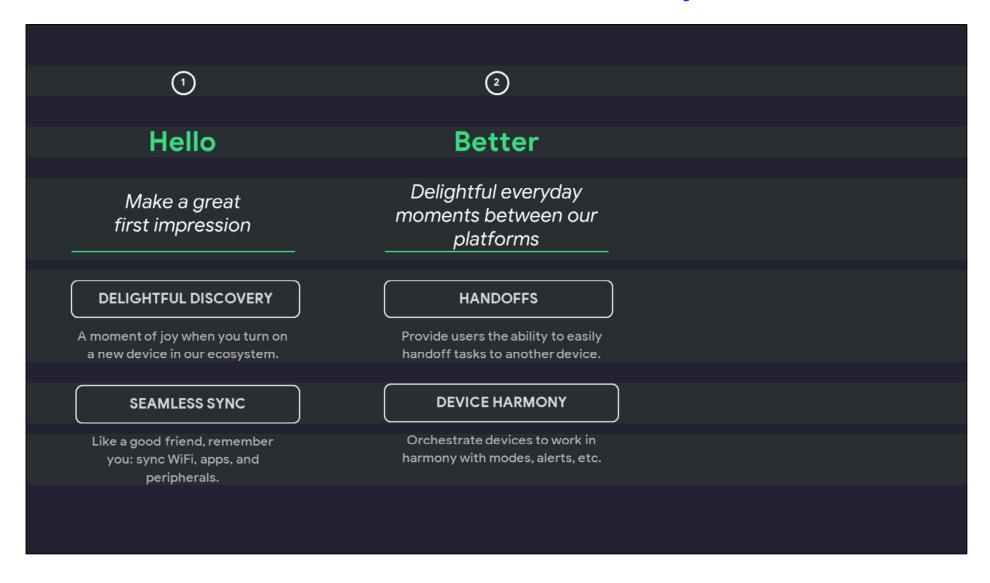
What are the building blocks to start now?

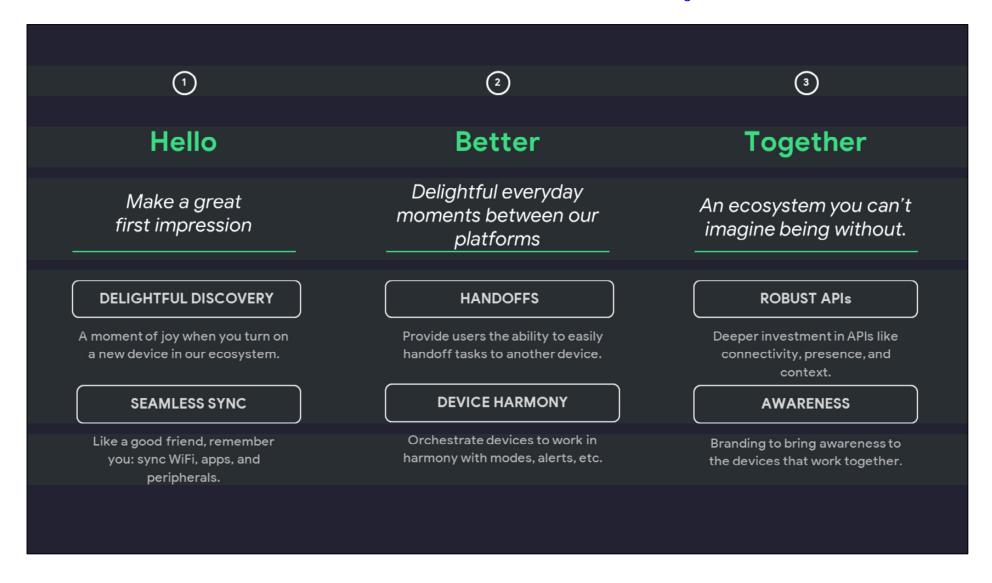
What technologies we already have, can we build upon?

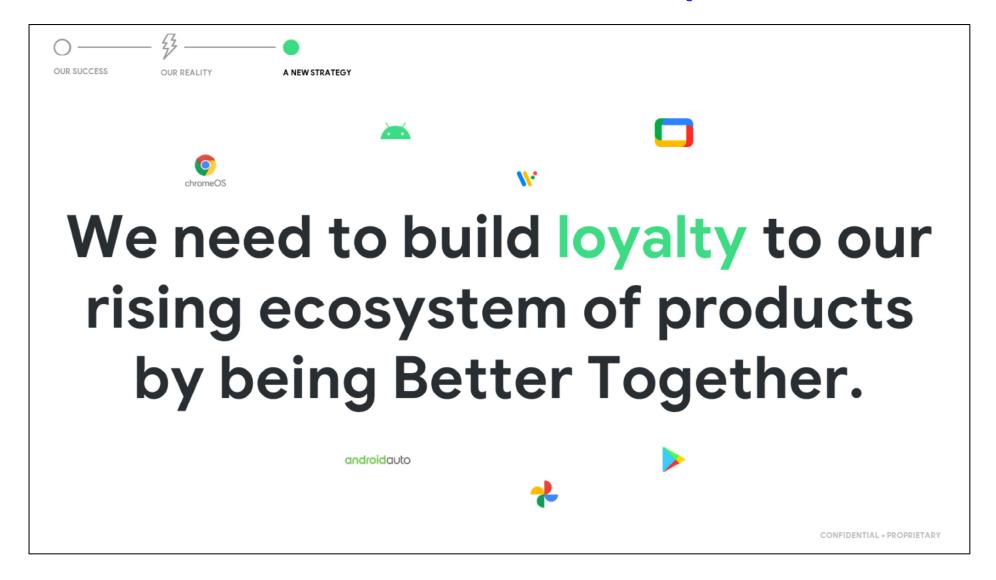
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- Voiceover:
- So how might we achieve Better Together?









- Voiceover:
- Let's build user loyalty not just for point devices, but for our ecosystem

